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ABSTRACT

The role of the institutional library consultant is explored in these proceedings of a workshop examining consultant work with administrators of various agencies, funding sources for institutional library service programs, management, and such aspects of library service areas in institutions as architecture, design, utilization of space, bibliotherapy, censorship, and legal and medical information. Patterns of organization, staffing, personnel, standards, training, evaluation of services, budget planning and preparation, and effective communications between consultant and institutions are the managements issues considered. The proceedings consist of in depth reports on the panel presentations, and briefer reports on the work of groups based on the reports of recorders of group sessions and the editing of verbatim tapescripts of the formal presentations. Participant comments evaluating the workshop are included, along with a directory of institutional library consultants. Samples of preworkshop preparation materials and materials disseminated at the workshops are also provided. (CWM)

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THE ROLE OF THE INSTITUTIONAL LIBRARY CONSULTANT

U.S. DEPARTMENT OF HEALTH, EDUCATION & WELFARE
NATIONAL INSTITUTE OF EDUCATION

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PROCEEDINGS AND SAMPLER OF MATERIALS
FROM A WORKSHOP HELD IN RENO, NEVADA
OCTOBER 9 - 11, 1979

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Editor's note: The Design Team and Workshop Facilitator determined that the Proceedings should consist of in-depth reports on the panel presentations, and briefer reports on the work of groups. Contents are derived from reports of recorders of group sessions, and editing of verbatim tapescripts of the formal presentations. The sampler of materials is included as a result of inquiries from the field related to the development of the workshop.

DESIGN TEAM

Arizona: James E. Morgan, Chairman
Colorado: Theda Kellner, Susan Loss
Montana: Edean Berglund
Nevada: Barbara J. Mauseth
Western Council Liaison: Herschel V. Anderson, South Dakota

Workshop Facilitator: Carmela Ruby, California State Library
Editor, Proceedings: Barbara J. Mauseth, Nevada State Library

March, 1979

REPORT TO: Herschel V. Anderson, State Librarian,
South Dakota Liaison to the State Librarians
of the Western Council

FROM: Carmela Ruby, for the Institutional Services
Consultants

Date: November 3, 1978

SUBJECT: The Training Workshop: "The Role of the Institutional Library Consultant", given at Reno, October 9-11, 1978.

Preparation for this workshop started in 1977 with establishment of a Design Team, which surveyed the member states for the concerns and needs of the institutional consultants. Much helpful material was received. The Team asked me to join it last Spring, 1978, to formulate a training program based upon the states' input, and to take responsibility for preparing and implementing the workshop.

In July advance agendas and "homework" questions for the participants and for the resource people were sent out. This material proved to be helpful in further refining the program, and in keeping speakers on target. In the summer requests for material to share at the Trading Post (an exchange and display of materials especially helpful to consultants) were also sent out. An informal meeting between the consultants of the Nevada and California State Libraries was held to firm up local arrangements, schedules, and tasks.

All of the material prepared in advance and for the packets distributed at the workshop are available to the State Librarians through the participants. Those materials are also being sent to the Western Council archives, and to Rich Wilson, Idaho, Coordinator of the Continuing Education Contact consultants of the Council, so that information on how much this multi-state training of state library staff was developed can be shared with future planners of Western Council-sponsored events.

A list of the participants is enclosed. Only Idaho, which had a schedule conflict, was unable to be present.

The workshop needed to provide specific new information on issues of top priority to consultants; stimulate the sharing of expertise and material/information during the event and in the future; provide an opportunity for us to develop sound working relationships with each other as our own best resources.

We were all aware that we needed to discuss our consultant roles in our various states, and also that satisfying follow-up activities by each of us be defined, so that our efforts at self-training and improvement did not end with Reno.

Instead of employing the more typical evaluation questionnaire, we asked ourselves to set down comments on specific ideas, information gained, likes, dislikes, and specific follow-up activities we are considering on our return to our states. This was followed by a long, informal discussion.

The enclosed memo to the participants recapping who is taking on what activities gives a good indication that we were all stimulated to further action, despite our heavy home schedules. The evaluative comments themselves (also enclosed) indicate that overall there was a high degree of satisfaction with both the process and the content of the workshop. Most important, we did seem to make a significant start on meeting the needs we said we had.

Although this was not specifically stated, I venture to say that we would endorse this kind of collective training for all kinds of state library staffs. It seems especially beneficial to those kinds of us who do not otherwise regularly meet or work with each other.

As it is, we do have two requests of the Western Council for follow-up training:

1) That it sponsor and support a two-day working session in fiscal 1979-80 for us participants to conclude the several tasks we will have been working on, such as finishing standards and the manual; putting the scrapbook of facilities into final form; reviewing training packages if such have been developed, etc. We also need to make sure that our collective work reflects a philosophy based on local needs and conditions.

   At this working session, we would also make preliminary preparations for:

2) A workshop for institutional library staffs themselves in fiscal 1980-81. This may be organized by the type of institution and/or clientele they serve, e.g. corrections only, or services to the developmentally disabled only.

There will be two publications resulting from this workshop: The Proceedings are expected to be edited and published by January 1979, and we recommend that two copies be deposited with each member State Library (including one to its Institutional Services Consultant), one copy to the USOE, and one to the ASCLA Division of ALA. The run would be larger to permit purchase by non-member state libraries, library schools,

library associations and the like. Announcements of its availability will have to be made.

The second publication is a newsletter, tentatively titled Prevail, Susan Loss, editor. The first issue is expected to be in November 1978; it will be a quarterly, and will focus sharply on the Western States' institutional services consultants, in order to meet our needs first. Its primary target group therefore is not the library staffs in instituions, though obviously they should receive secondary benefits.

A final evaluative discussion by the Design Team elicited the following: the problem of not enough time will continue to be frustrating whenever a workshop is providing both content and the opportunity to develop working relationships; we failed to assign priorities to the follow-up activities developed, and it is unlikely that all can be accomplished at the same time; the display materials at the Trading Post, while of merit, were underused, and under exploited for lack of time, by comparison with the usefulness of the give-aways...in the future, such Trading Posts should be just that...for give-aways.

A financial report is forthcoming from the Western Council Treasurer. It will not, however, reflect the in-house cost to the participating state libraries whose staff were Design Team members (especially Nevada and California). We estimate 500 hours in communications, planning and correspondence were used by professionals and clerks by the collective Design Team state libraries. We believe the benefits were definitely worth it, as the evaluations indicate, but it must serve as a warning that other state libraries be prepared to expend some time on continuing education events if they are to be worthwhile and successfully bring together such a far-flung group.

"THE ROLE OF THE INSTITUTIONAL LIBRARY CONSULTANT"

A Workshop sponsored by
the Western Council of State Libraries

October 9-11, 1978 at the Sundowner Hotel
450 North Arlington, Reno, Nevada

PROGRAM

MONDAY, OCTOBER 9

5:00-7:00 P.M. - Registration - workshop packets available

Trading Post - the Trading Post is a display and exchange of materials that we all have in our states and that we want to share.

Such tools for consultants include guides, bibliographies, sample procedures, user handbooks, public relations/publicity material, evaluations and the like.

TUESDAY, OCTOBER 10

8:00 A.M. - Coffee

8:30 A.M. - Welcome
Joseph J. Anderson, Nevada State Librarian

Commentary on Workshop Goals
Herschel V. Anderson, South Dakota State Librarian

9:00 A.M. - Consultant Work with Administrators
Michael Melner, Director, Nevada Department of Human Resources Agency
Clara Sims, Chief, Central Program Services, Napa (Calif.) State Hospital

Panel and Discussion
Barbara Mauseth, Kristy Coomes, Alene Cooper, and Kathleen Darcy

10:30 A.M. - Funding Sources for Institutional Library Service Programs
Larry Leonard, Library Program Officer, U.S. Office of Education

Panel and Discussion
Max Collotzi, Bonnie Crell, Alden Moberg, and Sandra Scott

LUNCH - Meet the day's speakers at the Sahara Reno Hotel

TUESDAY, OCTOBER 10

1:00 P.M. - Library Service Areas in Institutions: Architecture, design, utilization of space
James L. Larson, Architect, James Gresham and Associates, Tucson, Arizona

Dialog and Discussion
Susan Loss and workshop participants

3:00 P.M. - HOT TOPICS!

Bibliotherapy - Rhea Rubin, Bibliotherapist
Censorship - Marjorie LeDonne, Institutional Library Specialist
Legal and Medical Information - Susan Loss, Consultant, Youth Institutions
Participants' groups work

5:00 P.M. - Conclusion

WEDNESDAY, OCTOBER 11

8:30 A.M. - Feedback
Carmela Ruby

9:00 A.M. - Issues of Management of Institutional Library Service Programs

1. Patterns of organization of institutional library services in the states.
2. Issues of staffing, personnel, standards, training, etc.
3. Purposes and kinds of evaluation of services.
4. Budget planning and preparation.
5. Effective communications between consultant and institutions.

11:00 A.M. - Summaries and General Discussion of the morning's work.

LUNCH

2:00 P.M. - Decision-making and next steps
Priority issues developed during the workshop for ACTION

4:00 P.M. - Conclusion

WELCOME TO WORKSHOP

Joseph J. Anderson
State Librarian of Nevada

Good morning, ladies and gentlemen. I am certainly glad to welcome you, not only here to Reno, but to our State of Nevada. The workshop that you folks are here to do deals with one of those very difficult areas of human experience, providing services to people who are off on the wrong foot one way or another. They do represent, in our society, a most difficult challenge but a very necessary area of human interest and support. I can't thank you enough for each of you being in your callings and feeling enough about that kind of problem to work with it creatively.

The last thing I would like to say by way of welcome is that the fact that this meeting is held is a continuing statement of the concerns of the Western states, in particular, that we work together at the state level, planning and sharing. Many of our states, especially those of us from the Mountain Plains area, are relatively "have-not" states in terms of these kinds of resources and also in the most important resource, which is people who work these programs; because it is to the degree that you people, working together, working across state lines and working within your own state structures give credence to the kinds of things that we as State Librarians have to deal with, especially in our legislatures. I would just like to say welcome and I hope you all have a productive work here.

COMMENTARY ON WORKSHOP GOALS

Herschel V. Anderson
State Librarian of South Dakota

I'm Vince Anderson, State Librarian of South Dakota, and I'm liaison to planning this workshop.

A lot of you-all may wonder why we are first. I don't know if you-all know much about the Western Council, but seventeen Western State Librarians all got together and decided everything that they do back East doesn't speak to our problems here in the West. Consequently, let's us get together and bring our show together because we have a long tradition of cooperation across state lines, doing a number of things, both in the Mountain Plains region that Joe speaks of and also in the Pacific Northwest. California has always been willing to work within that

context with the neighboring states, mainly because, I think, California is our banker for the whole West.

Well, when you put all the Western states together we can jointly pool our resources and you're seeing one of those pools of resources here today. Planning together to hold a workshop for all of us. Who was planning together? The planning team representing the states of Arizona, California, Colorado, Montana, Nevada, and South Dakota. Planning for all of us. There are other design teams working on other workshops for similar groups.

Now you-all may wonder why you're first. The Western Council knows that institutional library people don't really have much of a forum where you can get together. There are some forums at the A.L.A., but how many of you get to the A.L.A. every time they hold it back in Chicago or Washington or New York? You really don't, and it's a rat race, plus you get problems of the Eastern states overpowering the problems that we have here in the West, so that we feel lost. Consequently, the institutional librarians or institutional consultants are the group we felt needed some sort of getting together first. There'll be others; documents librarians will gather together; we'll have handicapped librarians gather together; we'll have legislative research-type librarians getting together. All of these will come in time.

I've got a charge for you-all. You-all are probably, well many of you feel neglected in your states. Not a one of you really was there, or your program really wasn't there, I'll bet, until the advent of LSCA back in 1967, was it? But Title IV-A of LSCA brought all of you into existence. And all of you have been LSCA step-children since. Interesting as State Librarian in looking at comparisons at the amount of money spent by the states or by the state library agencies for the institutional programs. If you really look at it real careful, it's not really increased dramatically since the original amount under Title IV-A. It shouldn't be that way.

You're also looking at state libraries in the West becoming less LSCA-oriented. You're looking at yourselves as a part of an expanding state library agency in every one of your states. Now, some states are expanding faster than others, which is normal. You can see with your institutional libraries some trends in some states: Colorado as an example and maybe Washington, as an example, where the institutional program becomes rather large and begins to be recognized by the legislature and institutional administrations as the outfit that provides library service in those various state institutions. This pattern can't be followed in all states, but it shows you a gradual awareness of the problem. You-all know the successes that you've seen in various institutions.

But I give you a charge: your institutional librarians, you as their leader in each of your states, institutional librarians are just as lost as you-all are. You-all are here first to get to know each other so you can communicate with each other. Learn each others' names, learn telephone numbers, know what each of your problems are so that you can communicate among yourselves. You may want to get more formal in your communications. Our Western Council is encouraging a newsletter among you. We're also encouraging you to plan further ahead. Someday I'd like to see you-all ask the Western Council to fund a workshop similar to this just for correctional institution librarians. Or for mental institution librarians. Or for institutions dealing with the retarded [sic] librarians. So that you can expand this sharing down to the institutional level because it is a neglected level. How many of your institutional librarians even know what standards are, how many of them know what should be there? You may even want to have one for institutional administrators some time. That's not next year, but that's what you're talking about when you're thinking of institutional programs, your growth in your states for the next five or ten years.

Don't think that you-all are finished here. And don't think that this design team that worked this out is going to keep going and design other things, it takes all of you. Many of you have specific interests to design something else. Your Western Council is sitting up there waiting for you-all to ask. We started this by stimulating you today. Now we want you to stimulate us, by asking for additional things. You may not get all of them because money is limited, but you may get quite a few of them. So just ask. But come to us with a good plan, a good path and we'll certainly consider it. Because we want to see you-all develop, you're part of the development of our state library agencies. And the State Librarian to be in charge of that development will have to depend on you-all to come up with the planning.

CONSULTANT WORK WITH ADMINISTRATORS

Clara Sims, Chief of Central Program Services, Napa State Hospital, Napa, California

Michael Melner, Director of Nevada State Department of Human Resources, Carson City, Nevada.

Alene Cooper, Montana; Kristy Coomes, Washington; Kathy Darcy, Wyoming; Barbara J. Mauseth, Nevada, moderator

This session included presentations by two institutional administrators, followed by a panel discussion between the administrators and three institutional consultants. Previous to the

workshop, all participants were mailed 14 questions concerning interaction with administrators. This list was used as a base for the presentation, and is included following this summary.

Clara Sims told the group that she had taken the list of questions to a cross-section of state hospital facilities to elicit input. Her remarks, taken from responses by persons interviewed, indicated that institutional consultants generally were considered useful, and that the most repeated comment concerning consultants was that the sharing of information was probably the most helpful way in which consultants could benefit those with whom they work.

Ms. Sims also stated that the consultant must be aware of individual institutional protocol to determine whether to initiate site visits and/or exchanges of information directly with program managers, the institutional librarian, or the head of the institution. From comments of the group, this is a most important item: understanding the particular structure of each institution is an essential factor which can directly affect the ability of the consultant to reach those who can best work toward the success of library and information programs.

A number of the respondents to Ms. Sims mentioned that it was useful to them to have the consultant provide a scope note concerning individual visits in order that useful information could be provided prior to the visit, or appointments made with appropriate personnel to facilitate the achieving of the meeting goals. Also, it was made clear that follow-up activities on the part of the consultant should include written documentation bringing together the reason for the visit and the outcomes. By so doing, the program directors and administration, as well as the institutional librarian, have a common basis for further discussion and action.

Concerning suggestions to assist the consultant seeking to establish friendly relations with administrators and subordinates, several comments were made relating to the need for the consultant to "know the territory", which comes back to the need to thoroughly understand the parent agency or institution, and the working patterns of components with one another.

It was apparent that both administrators and consultants were victims of surprises, ranging from closure of a library facility with no prior notice to the consultant; to change policy and philosophy on the part of agency heads which, due to the lack of communication, does not filter to program directors; to changes in responsibilities which, when not known, can create a change in the working climate between consultant, institutional librarian, and administration.

Questions concerning possible negative feelings toward a consultant and the utilization of consultants in joint planning or problem solving, produced some comments that indicated a possible hesitancy toward involving an outsider in in-house problems. Conversely, other comments reflected the feeling that sometimes the outsider might be able to stimulate action, or provide a broader, non-threatening point of view that would be accepted from in-house personnel.

Discussion between Ms. Sims, the panel and workshop participants concerning ways and means of consultants earning a place at the problem-solving table included comments concerning current emphasis on accreditation of institutions. The group felt there was a place for the consultant in preparing institutions for accreditation such as acting as a consultant to committees and providing needed information or models which the committees could consider when drawing up plans for individual institutions to meet appropriate standards.

Ms. Sims emphasized that there was a consistent recognition of the importance of the consultant's role in relating to people and knowledge, and a like recognition that this ability carried with it a responsibility of the consultant to share information and knowledge of resources.

Michael Melner's presentation took the form of wide-ranging comments responsive to the listed questions and participant discussion following Ms. Sims' contribution. The following paragraphs are edited and condensed, although the sense of his practical philosophy should be apparent.

My department is a classic sort of umbrella agency, you know, the term used to be "super-agency", sort of tacked on top of a bunch of operating divisions; and down some place in divisions are the institutions. So my reaction to this may be somewhat different and I think one of the things that any consultant in dealing with administrators of any kind has to worry about is institutions; institutions in sort of a state of flux; the business of de-institutionalization. The business of institutions are always in some kind of political trouble, they are easy to aim at. If the legislature is in session, they're being shot at and maybe before you start thinking about anything else you ought to have some perception of the problems of the institution, not only internally, but in its relationship to the rest of the structure. In my department, I think you have to have a sense of perspective in dealing with administrators at certain levels like in dealing with legislatures. Maybe you have to understand my job. I can respond to these questions and you, dealing with me, you're going to have to understand my pressures.

It may be that the most pressing issue is not, to me, the

grant for funding the library in Caliente. I really care about it, don't get me wrong, I really care about it, I really want to do it. At this moment, however, UPI is outside and they want to know why? the legislature is outside and they want to know why? They want an explanation and these become lesser kinds of issues to certain levels of administrators, or to any level of administrator if you've got practical management problems. Go back to the business of the institution. I think what you have to have in dealing with me, at least, is maybe a sense of timing; a sense of what's appropriate; a sense of what level you really seek a problem at, maybe a sense of me. Clara's point there, that there's one guy, you don't go down to his staff, you go to him. Well, you better know that, before you do any going. I'm easy going, I don't have any sense of structure at all. Anti-hierarchical. If you've got a hierarchical kind of dude up there at the top, then you'd better do it right. You better come up the ladder to him, you'd better say the right things--"Oh, boss, you're so smart", you know, depending upon what you want to get on and how you want to consult and how you want to relate to it.

I think you have to have a sense of the person you're dealing with, of the structure you're dealing with and a sense of timing about what the hell else is going on with his structure, with his problems. There are times in which I'd be delighted to talk with B.J., and she knows it; there are times in which B.J. will call up and I say wait, give it a couple of days--give it about a year--come back next session, that kind of thing. I guess what I'm starting out with: (1) institution; (2) know the institution's relation to structure and the political program; and (3) know the dude, know who you're dealing with. Everything else that comes down this list of questions, it seems to me, has to do with those kinds of relationships.

Any of these things could be answered any way you want to answer them. It depends on the guy, it depends on the structure, and the structure and the guy change constantly and you're going to probably be in place. Librarians stay and do fine jobs and set up enormous bureaucratic structures and just survive. You are probably going to be in place longer than the bureaucrats or the administrators you deal with, I would think. At least at the political level. You keep going back to you've got to know them, you've got to find them. Protocol? Depends--do you know your own states, do you know your own people? Well, you'd better if you're gonna get on with them.

In consulting, I suppose the approach we're really coming from is that you've got something you want to get on. You want to better a kind of service, you want to provide library services and library information, and that's good for you. Well, it's good for me too, but part of your job is selling.

I recognize that you've got something to give and it's good stuff. You've got to overcome a certain kind of reluctance, I think, on administrators, on what do they want, what are we going to have to do here, what kind of form is this, how big is it going to be, how long is it going to take.

What follow-up activities do you expect from a consultant? Well, I need to be informed, I need to know what's happening. I don't need to know every single step, that's why you've got your job and I've got my job. You've got your job to do and I've got my job to do and we ought to be doing them together. I don't need to know every single thing you do but I have to know generally: are we going forward, are we getting things in place, are we able to hire, did the money come, why didn't the money come, do you really want me to talk to the Senator, or will you talk to the Senator? Do your job and keep me advised generally about the progress. I don't need a surprise. Don't surprise me with bad stuff, but keep me informed. Well, that's your business, isn't it, distributing information. So that one should be easy for you. How much do I need to know? Enough so that I'm not surprised in the political and governmental processes; so I'm not embarrassed; so I'm not caught; so I'm aware so that I can help you when you need help, and so you can help me when I need help. That's how informed I need to be, but I don't need to run your business and you don't need to run mine. You're consulting to me, which gets down to the whole business of what is the most important, which quality a consultant should have--understanding.

Understanding the nature of my problems, understanding what I'm trying to do and how library services relate to that; understanding the nature of institutions, the political realities of keeping institutions alive and afloat and out of the soup. Everybody's business is the most important business, I believe that, but sometimes you've got to be very patient with me. As an administrator I can be an ill-humored, foul-tempered, hierarchical s.o.b., who's difficult to deal with. But you're going to have to deal with me because we both have some things we really want to accomplish. We want to run the best possible institutions. You want to provide information and library services in the best possible way. You know, this talk about me understanding you and what do I want? I want you to be patient and understanding with me and patient and understanding towards my problems. I'll stop at that and lay it on you.

CONSULTANT WORK WITH ADMINISTRATORS: Further comments

After presentations by Clara Sims and Michael Melner, members of the group offered further questions, possible solutions, and comments concerning the general area of working

with administrators in an institutional setting. The following paragraphs are indicative of the comments, but in no way can capture the interest and intensity of the group.

The difficulty in locating the right person to talk to concerning a specific program area was discussed. Possible solutions offered included the use of the state telephone directory which often specifies programs and program managers; and obtaining an organization chart of the agency or institution involved.

Suggestions to help the consultant seeking friendly relations with administrators and subordinates were offered, some of which are included below:

> "It goes back to the ability of the consultant to relate effectively to other people; and, again, the sharing of information and the feeling the time was well spent."
> "Don't spend a lot of time telling us (administrators) how good we are. Get down to realities: how can we improve, what suggestions do you have to upgrade."
> "People want to be informed about what you're going to say to the other person. What are you going to say following your visit with them. When I talk with an administrator, I never leave without saying, 'How much of this may I share?'...When I'm talking to somebody before I go to a meeting, I say, 'I plan to say such and such, does that sound okay?'..I learned the hard way that when I didn't clarify, my assumptions were not accurate about what was privileged and what was to be shared."
> "We forget about the people who are actually there laying on hands, providing the services, the guy on the line. His recognition (which) will come through the program manager as opposed to the administrative staff, is very important... It's getting the education down to the right level, and I think that the program manager will certainly be able to do that with the on-line staff."

Other programs or subjects discussed included

- the place of institutions within the total organizational structure of super-agencies, and the place of the library within the institution;
- legal responsibilities of the several states relating to institutions and institutional library programs;
- frustrations inherent in attempting to provide a "full-service" program while also dealing with internal institutional pressures to provide satellite libraries;
- the importance of establishing and maintaining working relationships with both management and clients, while neglecting neither; and

- the necessity of being aware of current and pending legislation on state and national levels that will affect the total institution, including library programs; and to share that awareness with administrators and program managers.

QUESTIONS FOR INTERACTION WITH ADMINISTRATORS

1. How do you react when a state institutional library consultant requests an appointment with you in order to discuss library services for your institution?
2. Do you prefer that you only be contacted by the supervisor of said consultant? The director of the State Library Agency?
3. What protocol should be followed by a consultant contacting your agency? By letter? Telephone? To whom?
4. Do you ask for additional information before scheduling the appointment?
5. Are you likely to suggest that the consultant contact a subordinate who has direct responsibility for the library's services? Is this the best route?
6. Do you have suggestions to help the library consultant seeking to establish friendly relations with you and your subordinates?
7. Can you describe your reaction to the word "library consultant," i.e., what comes to mind? Why?
8. Are institutional administrators generally receptive to joint planning for the improvement of library services?
9. Have you experienced a negative feeling toward a library consultant? Do you remember why you felt that way? Appearance? Voice? Manner? Skill? Information?
10. Do you prefer a brief oral presentation substantiated by written documentation?
11. What follow-up activities do you expect from a consultant? With what frequency? How?
12. Do you keep the consultant informed about changes occurring in your agency? Prior to the change? After the change? Only when problems arise?
13. Do you utilize the consultant for problem solving?
14. What is the most important quality which a consultant should have?

FINDING SOURCES FOR INSTITUTIONAL LIBRARY SERVICE PROGRAMS

Lawrence E. Leonard, Library Program Officer, USOE; Max Collotzi, Utah; Bonnie Crell, California; Sandra Scott, New Mexico; Alden Moberg, Oregon, moderator.

Dr. Lawrence E. Leonard, Library Program Officer, USOE, began by offering a number of references to sources from which Federal funds could be secured for institutional library programs. He provided the group with hand-outs, including title pages of useful items such as Directory of Library Research and Demonstration Projects, 1966-1975 (HEA, II-B); the FY/78 abstracts for the same program; a reprint from American Education, on "Taking the Guess out of Grantsmanship," and the Federal Programs for Libraries: A Directory, August 1978. An especially helpful part of the directory is the bibliography of publications dealing with grantsmanship.

In addition, Dr. Leonard indicated alternate sources of funding, including private foundations, and provided titles of resource materials from which information can be obtained. He also reminded the group the Catalog of Federal Domestic Assistance, and the vast amounts of data it includes.

Dr. Leonard emphasized the need to identify appropriate fund sources for needed programs, and verify the program's eligibility, through a letter of intent, before plunging ahead into a fullblown proposal. He also cautioned the group to look closely at the place of the library within the institution so that its eligibility for "non-library" related funding programs can be established.

Following Dr. Leonard's presentation, panel members related their experiences in gaining support for particular programs.

Bonnie Crell started and ended her discussion with a statement that one of the most important parts of grantsmanship is to know the people responsible for obtaining grants; know those who are knowledgeable about grantsmanship, or those who know others with a role to play in awarding grants.

She reminded the group that it is vital to be prepared to tell grants people specifics about what can be accomplished when with what identified dollars. Commenting on the difficulty of obtaining other than LSCA and ESEA funds, Ms. Crell declared that "I really wonder about the job our librarians are doing, and the job the LSCA dollars are doing, since local administrators are still not convinced of the importance of library programs through demonstration."

She further agreed with an earlier statement by a workshop participant that the route to recognition by administrators is to design a library program that then serves them.

Ms. Crell concluded her remarks by stating: "When we look to administrators and say, 'What can we do to improve our status?' and the administrators say, 'Come to me with some good programs and tell me what you've done,' -- that emphasizes the need to build our own cases."

Sandra Scott then told of New Mexico State Library's success story in obtaining $15,000 in LEAA funds for use in the library facility of the state penitentiary. The planning director of the central office of the state corrections division was involved in the process from the beginning, with the result that not only was a library plan of service developed, but also a plan for the re-design of the facility.

Ms. Scott noted that the NMSL has earlier tried to get such a grant on its own, but unsuccessful. Working together with appropriate persons in the corrections division, including the "law and order" warden, the NMSL institutional consultant staff were successful in persuading the warden to convert one and one half guard positions to one library position, to be paid with state correctional funds. In effect, the prospect of obtaining the LEAA grant was a carrot that was offered in exchange for the librarian position.

As did Ms. Crell, Ms. Scott emphasized the need to know those in the know, and to extend contacts beyond one's own agency.

Max Collotzi provided the group with a guided tour of the steps to take in obtaining funds at the state level through the budgetary system, and reviewed steps to be taken in presenting programs and budgets to legislatures. He emphasized the need to show institutional libraries as separate, identifiable programs, rather than putting them under a "miscellaneous" heading. He stated that "If they can't see it, it's not important; it doesn't get funded."

Mr. Collotzi told the group that he provides several workshops for institutional librarians and that he meets with them on a quarterly basis so that all of them will have an understanding of one another's programs and problems, and can work together to seek solutions. He particularly stresses the budgetary process in workshops, and insists that the institutional librarians learn to write budgets, including goals, objectives, needs, explanations of how the funds have been used, and successes or failures the programs have met. When he writes the total Federal funding program comments from the institutional librarians are included to strengthen the rationale for funds requested. The same kind of involvement is followed in preparing the state budget. Mr. Collotzi stated that in 1972 three-fourths of the

institutional budgets were from the Utah Library Commission and other grants, and in 1978 the position is just the reverse. He credited the increased abilities and understanding of institutional librarians for this turnaround.

He also stressed that "...budgeting ia a political game, and we all have to be politicians." In playing the game, it is vital that those presenting the programs and budgets are able "...to tell the story...to justify your programs so it can be understood." He concluded with admonitions to workshop participants to "know your organizations; know how rigid the controls are; know the important people; know your legislators; and know people who know them."

Alden Moberg reviewed for the group some of the fund sources providing support for institutional library programs in Oregon, and indicated that some of the support were spin-offs of other programs.

Among those specifically mentioned were a CETA-Title VI program on Adult Basic Education in one of the institutions, under which materials are funneled through the library; and $4,000 annually in grants from the American Printing House for the Blind to the School for the Blind.

Also mentioned and described was a program of basic education opportunity grants provided in one of the prisons. The program is administered by a community college, but the institutional library provides reference books for the students, who are unable to leave the prison campus.

Mr. Moberg also told the group the program under which a retired senior citizen provides 25 hours per week at a mental institution, and commented that this was one of the programs in which the library can participate, although the opportunity is not often taken. Funds are administered under the Senior Community Service Employment Program.

Other funding sources used in various institutions of Oregon include ESEA- Title I and IV, and the Reading is Fundamental program.

LIBRARY SERVICE AREAS IN INSTITUTIONS: ARCHITECTURE, DESIGN, UTILIZATION OF SPACE

James A. Larson, AIA, NCARB, James Gresham & Associates, Tucsson, Arizona, has been a professor at the University of Arizona School of Architecture since 1973. A teacher of a course in Correctional Design, he is familiar with the problems involved in working with all levels of government responsible for making facilities available for the institutionalized.

The editor determined that it would be useful to include the greater part of Mr. Larson's presentation, and to summarize the questions and responses that followed his explanation of the step-by-step process to be taken by the institutional library consultant and the architect.

First of all let me give you a couple of minutes of format. When I first received the invitation, I was delighted for a variety of reasons. Not the least of which is that institutional planning work is an area of deep and dark mystery and I'll do anything I can to clear it up any place.

After I received your responses from Carmela, I scrapped the old program, the one I had prepared, because as it turns out, a canned program is not going to be at all responsive to the kinds of questions that were asked. So what I decided to do was define first the problem as I see it, and then explain what architects do. It's a linear problem solving process with a very simple way of stepping back into the process at any time. We just happen to handle spaces, light, color and buildings and structures. That might be the mystery, but the rest of it shouldn't be a mystery. And then I'll discuss some of the things that I think you as institutional consultants who are on line can, if you wish, assist in planning institutional libraries. Discuss that for a bit and then begin to respond to these questions. I've taken away the format of a very rigid program and instead I've installed this set of responses because it looks like that is going to be much more profitable to you.

First thing, the problem as I see it is really one from the point of view of institutional library consultants. What I am going to suggest in a few minutes is probably akin to political action except that you want to get involved at the decision making level for this particular institution that you'd be involved in. If you don't want to do that, then you'll have to have your individual librarian do it. In any case, you've got to get to the point where the decision is made and let it be known that a need exists. If you just

assume someone's going to take care of the library, I can guarantee you from the level of institutional planning that it will be taken care of figuratively only. There will be a space, a place, a few lights, light switches, enough space to put few library shelves, and that's it. So it'll be taken care of at that level only, because as an institutional planner, if the priority or the hierarchy of the need for the library is low, then we really don't respond to it very well. We only respond to those things which are signified as important. The only way you can make that important is to make a lot of noise. Let me explain why.

The architect, on one hand, has a series of supports: first of all staff and this could be in the context of ownership of a firm or not. Also, the architect has a series of consultants and those are structural, mechanical, electrical, (mechanical also means plumbing) and any other specialty category. In this particular instance, if you have a large institutional library, there are those people who make their living assisting in institutional level planning, so there would be a consultant.

The first key I want to make sure that you're aware of, if they've got one of those guys on board, that's the one that you're going to develop the relationship with because he's going to be looking after your particular concerns. Now that's only at large institutional library levels. If it's a state prison or county jail, this guy is the guy who's going to have to look after assistance because they're not going to have the specialty consultant on board. The reason this is arranged this way is because the architect collects all the fees and disburses all of the subdiscipline fees himself. So he's the guy that makes the decisions. We pride ourselves on the fact that we're supposed to be problem solvers and we do a moderately good job of it, at best, most of the time. On the other hand, the client, if the architect has done his homework, should have a single project representative responsible at that point. If you don't, if the architect is responding to a committee, you can already throw your hands up, because decisions are going to be made in a haphazard manner.

This is a project director, and it could be anybody, it could be somebody from the physical plant of the state corrections department, it could be an assistant director of the state corrections department, whoever it is on line that the architect deals with. That's the guy that you've got to go talk to, and if he won't talk to you, then you've got to take the organization level risk and jump over there and make noise over on that side; so somebody recognizes you at the decision making level. So this is the guy that you talk to, because every agency that that guy has to deal with to get a state prison done is this project director's constituency. So you're his constituency.

What you want to do is just get out your drum, go stand in that project director's office and beat on it until he makes a recognition that you're a legitimate constituency. That's the only way it's going to happen. Even at the county jail level, it will still happen that way. If you have a librarian that's not assertive enough at the local level to do it, then you can go do it yourself, if you feel comfortable getting in there. The only other way is to shortcircuit the process and it's dangerous in most of the organizational structures that you're in. And that's to let the architect know that something's been left out. Because you've subverted this guy's role, so it's very critical that you be very careful doing that. But in some cases you've got to make sure that the architect recognizes that you're a constituency.

The process happens this way. What happens in corrections is that the libraries are very clearly a lower level than say security, or staffing problems. Libraries are well funded after cable televisions and closed circuit TV, internal and master controls, virtually everything else. Someplace along the line, you've got to marshal all the information that's available to you, and it's becoming quite clear that first of all, constitutionally you've got a great big hammer on your side. It's virtually impossible to build any kind of correctional facilty now without a library. It's also virtually impossible for any jail or any other institution to go along very much longer without having one, so you've got this enormous hammer. Just go use the hammer and make yourself known.

If the architect that's involved has done this type of planning before, chances are the library will already be on his check list. That doesn't make a big deal at all if he asks and the practical fellow here says, "Well, that's really not very important," because then immediately the architect assigns that priority. Because we reflect the priority of the hierarchy of this establishment, we don't set it. That's a very important distinction. What we do in the profession is gather, assemble, reassemble, analyze, reanalyze, until we can make a final recommendation of all of the needs that the client sets for us and picks up. Now, most of us also go looking for things that are missing, in the event that either this fellow or a constituency has been either left out or the information is incomplete. Still, when it gets right down to it, if we ask and someone says that's not important that's as far as we take it. So you've got to be aware of it.

Very often, then, if it is a budget problem and even if your constituency has made itself known, then there's a level of importance, a hierarchy that's established for us, there are these that are most important, there are these that are less important, and there are these that are least important. If you're in the the least important catagory then chances are if there's a budget problem then you're going to have some difficulties with the facilities. Really, a library,

that's just a room that you've got to go and take care of and establish security for, proper lighting levels, and buy furniture for and all the rest of that is a long way from ever getting done because you have to do all the rest of the battles that you're all very familiar with, trying to get all the rest of those things in there, either bootleg or otherwise.

The best way is to go to that organization where it has to happen this way. If instead there's a committee established, then the architect deals with the committee and every one of us live in fear of that sort of structure and it happens all the time. Witness a church building committee, or witness some other kind of planning committee that we're responsible to, because we can never get a clear understanding of the things that are most important from this group. From your point of view, however, it might be better if there's a committee there because then you can pigeonhole one strong member of the committee and work that person over until that person recognizes and responds to you. And then the architect, the poor hapless sap that's here trying to respond to the entire committee, hears this one particularly strong committee person and lo and behold, your hierarchy is established and the library's more important.

Essentially you're going to have to become active. Whenever there's a building process underway, don't wait until you hear that it's already being planned. If you hear that they are getting ready to plan, that's the time to strike. You can't wait until the thing's in process because by that time you're going to go wandering into this and if you are recognized at all you're going to be recognized in the far corner, in the spare space that the guy had set aside for something like this. Because we all have a contingency left over some place, because there's always something else that comes up then, oops, in goes the library and it's never in the right place, for obvious reasons. Because it's always planned for additional expansion or leftover or extra space.

In Arizona we actually were contacted by the city library system and the city library also called Susan Loss and the county system wound up taking over that library as a result of a program recommendation that we made. There's a situation where the project director refused to recognize the library as a legitimate concern so they came to us and we just dropped it in the program and, by default, made policy for Coconino County. Just by default, just dropped it in there and just sort of pretended like nothing ever happened. And one day the library was built, the shelves were put in, panic buttons were put in and all that sort of stuff. And it just happened. That's sort of the second way, it can be done by going directly to the architect but all of you, of course, are involved in already clearly organized government structures and it's very dangerous to your positions to do that, so do that very care-

fully, but don't be bashful. Because if you're bashful, you are going to be left out.

First of all as a reference for you, I don't know the publisher but the name is, it's a book called the Universal Traveler. And the Universal Traveler is a problem solving exercise book that we recommend for architectural students. I'd like to recommend the Universal Traveler because it does explain how problems are posed. That means that you understand how problems are posed, then that means that you get your problems recognized.

I'm going to do a diagram of the architectural process. I'm going to take you through it, using some of the language that you have to use in order to be able to see it, so that you can get a clearer understanding of what the architectural program is about. Now, the word PROGRAM is a particular one, and in order for you to be recognized in the later architectural design, you have to be recognized in the program. Because the program is a statement of the problem. That's what it's for so the architect has everything put in his language, so he can do it. It's generally done in plain English, and the architect then works his supposedly mysterious things on it. The program, then, is the place that you want it to be because it states the fact that you are in the process and you are important to it. A program is developed by four clear steps at first, and then its informational developmental things afterwards; and, if any of you have any process level problem solving experience, you'll recognize the diagram because it's a problem solving diagram. There are FOUR main areas that we have to go through with a client first. First of all, we have a PROBLEM; it's very difficult to design a problem that we don't believe in, so we have to accept the problem. Sometimes that's really very critical because the architect might very well wind up accepting a problem and that's not the one you wanted him to solve, so you've got to make sure that he understands what the problem is.

Then we have to spend a little time in the VOCABULARY of the particular problem, enough to understand what the relationships of the components are. If you're talking about a reading room and all I've ever done is cells before, it's going to take me a little while to understand what the concept "reading room" is. From your point of view, it would be advantageous to see that that vocabulary was clearly understood. That would mean, from your point of view, preparing for the first meeting with an architect that's planning a facility for you, by working up a vocabulary list, believe it or not. Explaining to him what you are talking about and if he's done institutional work before, he might very well have his own idea of what the vocabulary is, which might be surprisingly at odds with what your idea of vocabulary is. It doesn't make any difference what words you use if I say X and immediately think of reading room,

that's all we need. Just got to have it so we understand what the concepts are. So you have a vocabulary to establish.

Then we need to know all the ELEMENTS OF PLANNING. Now those elements are variable depending on what the problem is. The elements could be the people, it could be the statement of the problem, that would be budget, that would mean area location, type of people who are going to use the facility, etc. You need to know what the elements of the problem are. As much as we can, in introduction and outline form. Something when we give it back to you, makes a clear statement of what the problem is, are the PROBLEM GOALS. You want the best library in the world; then don't settle for less. Make that your goal. If you want a library that's a regional library and serves a particular clientele, you should be able to say that in no uncertain terms. We rely on you to do that. If the goal statement we get from you is unusually fuzzy; then we'll ask you to clarify it, if we're doing our job. If we're not, we just accept it and go on with it, and you'll probably get a fuzzy institution when you're done.

These four things are absolutely critical to the statement of that problem. We rely on you to state those things; we can't state those for you, because we don't know what the problem is. This is called the PROBLEM STATEMENT and in any program those elements and a lot of others that are details that are particular to your problem will be stated for you. Make sure that everything that you think the problem is, is stated someplace, because if there's something missing, that has some amazingly disturbing effects on what the design might actually be when you're done.

Then we go through a process of just thousands and thousands of pieces of information. That's INFORMATION GATHERING. What we're going to do now that we have the problem statement is we're going to spend a long time, everybody that's involved, asking questions. Here's another alert that you can place in your study notes. And that's that if the architect that's planning the institution hasn't consulted with you, then he doesn't have the complete problem. Run a flag up the flagpole, get on a telephone, stand on top of a building and holler and shout, take off all your clothes, whatever you can do to make a spectacle of yourself so that somebody recognizes that you've been left out of the process.

If it doesn't work any other way, then play the organizational game and call the architect and say, "Hey, I've been left out of this thing. Would you please call the project director and ask how come a library hasn't been installed?" or something. That's an information gathering and that kind of information that we're looking for is of the detail that you were asking questions about. And it's of the detail of light levels, interior furnishings, fixtures; who uses it? what kind of safety problems do you have? how many librarians are you going to

have? what kind of stacking problems do you need? HOW DO YOU WORK? Believe it or not, some of you have been asked that question back in the back place of your experience someplace, before you got to this point and you gave them an incorrect answer. You shouldn't give incorrect answers to things like that, because if you give an incorrect answer or an incomplete answer, then how you work is going to be profoundly affected by the fact that the architect has designed a pattern that doesn't fit the way you work, and each of you work differently. So that's another thing that goes on your list, alongside vocabulary. How do you work? Tell it.

You can tell him in diagram, you can tell him in plain English, you can tell him in symbols, anything, as long as you tell him how you work. If you've got a particular budget for your portion, of course, he needs to know all that; that's routine information. We need to know specifically how you work and where you do the things that you do. What kinds of things do you want? But be reasonable about the whole thing, because if you want a million dollars worth of institutional library program and you have a quarter of a million dollars worth of budget, then say a quarter of a million dollars; these are things I want. Now these are the things I'd like to have if there's money left over in the budget. So you can give us that kind of level of information.

From that point then all we do, and this is data, this is a process of data, and I'm going to use the word analysis, but it's really handling. Where we go through and drop all extraneous information out. And extraneous means two things: it's unrelated to the program, and we gather lots of that, or it's unrelated to the program in terms of budget. We'll come back to you a number of times here, then we'll come back with all the data analysis and ask you if we're doing our job? We'll ask you is this correct? Is this really what we're doing? We'll keep you involved in the process, and we'll go back through all of that; then we'll begin to divide all of that information into categories, so that we've got some handles, so that we can organize things. Then we'll go through a period of evaluation and all of the analytic activities. We go through all of this and try to relate it to a budget, because by that time we know about how many square feet are required, what kinds of facilities are required, special lighting conditions, special power conditions, all sorts of things. There's no design that's been done yet. The program ends here and that's the statement of the problem: THE PROGRAM IS THE STATEMENT OF THE PROBLEM.

Now you might very well have one architect do programming and have him hand off to another firm, because he was only hired to do programming. Programming is effectively about 1% of the construction costs if its properly paid for, and it never is properly paid for. What happens at this point then is DESIGN begins to take place. The first thing that

happens in design is another evaluation status, if there is a new architect involved. Otherwise, this thing just moves across. At that point, we'll restate the problem in architectural terms. Three dimensional, something called SCHEMATICS. At this point, then, some schematic design work is prepared. Those are generally rather informal and they're sort of casually done. I'd like, at this point, to make that you're aware that that should not be the last time you see the drawings. If you see the schematics and decide that's okay for the library and they never come back to see you, then there's something wrong. You should stay involved in the process. So what happens is, the architect develops a series of alternatives, as many as necessary in order to get a clear idea of what's going on in the process. Actually, you should be involved at staff level in evaluating those alternatives and picking the one that's the strongest for everybody, which means that you, as a librarian and as a library consultant, need to know that your library might wind up taking a slightly less important position to some other functional criteria. The architect can answer those kinds of questions. So that you've got a process here of evaluation and you'll know where the library is and about what it's doing in terms of its relationships with other things and that's all. From this point, one of those alternatives is selected and developed. You should stay involved in that process.

There are two more steps. After schematics there's a phase that we call DESIGN DEVELOPMENT, and that's where one of the schematics or one of the alternatives is brought forward. It's premiated essentially to the point where that's the one you're going to use. And what's premiated might very well be one alternative with aspects of others. So the final design might not be any of these five, but it might be a sixth which is a combination of something previous. But from the design development stage, you should be involved at design development at the review at the end of that to make sure that all of your power, lighting, space and security requirements are met. THAT'S THE LAST TIME YOU'RE GOING TO HAVE A CHANCE.

At that point the architect goes away and documents all of your decisions in something called working drawings or construction documents, as we refer to them, which are specifications and drawings. Your last chance is design development, so you should insist on a DESIGN DEVELOPMENT REVIEW, and use that exact phrase. Then we go away and put the thing out for bid and it gets constructed. There's also nothing wrong with asking to be taken through it while it's under construction; in fact, it's a good idea. Because you'll be surprised at what comes up; you'll be surprised at what's been left out. You'll be surprised at what the project director has done to you or what the architect's forgotten.

Essentially, what I've said is that this process and the people that are involved in putting this process together are almost

an adversary. Not quite; they're going to get some things done for you. But they're almost an adversary because they're going to continue to work to refine something and it might very well be that the refinement phase of that is going to cost the library. It's going to cost the library in terms of budget and space, so you should stay eternally vigilant and always be ready to make a lot of noise. The only thing that's missing in this that would make it a complete problem solving process are FEEDBACK LOOPS. A feedback loop means that there's a recognition that something's been left out, so you have to go back and finish that before you can proceed with the process. Our problem solving has a phase of feedback where we actually ask ourselves: have we got everything? which means that we have to undertake one more analysis of information. If you have to go back and redraw for something that you've left out by your own careless hand. If the client has left it out then you can ask the client to pay for the disruption of the process.

Finally, I want to leave with you this thought. Architects are just regular live folks. Architecture has, I'm afraid to say, much more chance to affect people's lives negatively than positively. So we're always looking for ways to minimize the amount of negative impact that our planning has. The way we can find out how that reduction of impact can be established is by talking with everybody who is involved in the process.

If someone's planning your facility and you haven't talked to him, then you've been shortchanged and so has the architect, because the process is not complete. You're now in a position to understand that the architect really needs, in an ordered way, to deal with all the people who are going to use the facility. The purest idea would also be to involve the residents of whatever place you're in. It's difficult to get that done for management policy reasons. Certainly all the people who manage and see to it that something's delivered in the way of services or support or some kind of a system, are all consulted. It should go to staff, beyond the staff department head level, and in to staff themselves.

The majority of questions addressed to Mr. Larson dealt with means of providing security while maintaining a feeling of openness for library users; ways in which to create space where seemingly none exists; how to work with administrators, staff, and architects to gain the best possible facility from which to provide library services; methods to transform small, dark spaces into inviting areas for browsing and study; how to estimate costs of building or remodeling facilities; and how to cope with constitutional mandates concerning space requirements that threaten already inadequate quarters for library service.

Basically, the responses boiled down to PREVAIL!!! PLAN! P PERSEVERE! In recognition of this eminently sensible advice, the fledgling newslatter was subsequently entitled PREVAIL!

A selection of the questions and responses are dealt with in the following pages.

To questions concerning security, Mr. Larson stated that it is seldom that security and privacy can be shared in the same facility, unless there is sufficient support staff available. Short of locking the doors, there is no privacy. He suggested that in addition to a panic button an intercom with a voice over-ride is useful in terms of personal security. Such equipment has been on the market for over 20 years, and is readily available. He suggested that more than one panic button be used, particularly in cases where the librarian moves about the facility quite often rather than remaining at a desk. He strongly suggested using both the panic button and a back-up system, such as the voice over-ride intercom.

As to collection security, he suggested using one of the commercially available magnetic tape detection systems. As a stopgap in existing facilities, or for those with no money to install the more sophisticated systems, arrangement of furniture and equipment to form a "feedback loop" can also be useful.

Addressing the problem of maintaining security without extending the institutional atmosphere, he suggested working on management to provide safety windows without bars, using several layers of tempered glass, and plastic lexicon or butyl resins as a filler. These are expensive, and can become a maintenance problem when patrons break the glass, but they have proved successful and can create a visual openness which is conducive to a more relaxed atmosphere.

Concerning security of materials in an institution for the severely mentally retarded patients, Mr. Larson said that electronic detection systems were the only way to prevent the disappearance of materials, unless sufficient staff were available. He also stated that the sound emitted should be a chime, rather than a buzzer.

Responding to questions concerning maximum height of shelving to permit use by wheelchair patrons, he stated that 48" would be a comfortable reach for paraplegic users. As an alternative Mr. Larson suggested that it might be better to assign staff to "browse" with the person, reach the books, and discuss them in a reader's advisory fashion. Larger libraries might well shelve a rotating collection of books in low shelving. Rather than special areas for patrons in leg braces and wheelchairs, wider aisles to accommodate the special devices should be planned, probably at four feet per aisle.

Other suggestions for dealing with the handicapped patron included use of support staff, and individual consultation, with staff then bringing the material to the patron.

A question was asked concerning how to design a new facility from scratch that would be totally accessible to the physically handicapped, using a pre-fabricated structure. Mr. Larson provided the name of a company that was set up to serve insurance companies dealing with persons who have lost limbs or use of limbs; and recommended that Tom Brandon of the company would be most useful as a consultant. The company name and address: VALPAR CORPORATION (Rehabilitation Services), 3801 East 34th Street, Tucson, Arizona 85713.

In discussing the sort of architectural requirements that should be given top consideration, Mr. Larson stated emphatically that staff security is the highest priority, followed by making materials and services visible and accessible. Also to be kept in mind are recent court decisions mandating specific square footage, plus space for legal materials. It is necessary to comply with these decisions in spite of the consequences resulting from having to compress storage space, shelving, and other library necessities.

When asked if he had ever seen an institutional library which he had felt was a good one, Mr. Larson answered by saying: "I've never seen a good one because no one has taken it as far as it could be taken. There's usually a limiting factor when you're done, and that's generally the administration of the institution. That's where it really stops, and that's where your real job starts. To soften up the administration of the institution."

In dealing with ways to make available space more efficient and pleasant, Mr. Larson dwelt on the use of color, lighting, and the arrangement of furniture and equipment in informal patterns, to get away from the institutional astmosphere as much as possible. He also recommended the use of 9-foot rather than 8-foot ceilings whenever possible.

Another recommendation was to use tempered glass partitions to separate quiet areas from other areas, such as in an integrated staff/patient library; or to try and provide different ceiling levels and acoustical baffles, so that in one space it is possible to satisfy two different clienteles.

Availability and suitability of space was also a topic of discussion, with no real answers being possible, due to the individual circumstances of institutions. Mr. Larson repeated his charge to the group to PREVAIL in search for adequate and suitable space, which involves assertive action on the part of the consultant and/or librarian in dealing with administration.

Cost factors were discussed at some length, and Mr. Larson told

participants that construction costs have a 9-10 year cycle reflecting about 12% inflation rate a year, with a softening to 6-7% every four or five years. He suggested planning for everything that is needed, plus 10%.

Asked about guidelines to use in determining costs of converting or modifying an existing building to a library, Mr. Larson noted that as a rule of thumb, furnishings ought to be $7.00 a square foot. Anything less means that "you're being cheated out of something." He also said that for just painting and putting lighting into a shell, an additional $12-$13 per square foot is needed. If there is an existing shell, and the work to be done is putting in walls and lavatories and suchlike, costs could be anywhere from $26-$30 per square foot, just for the construction.

Continuing the discussion about costs, Mr. Larson stated that given current prices, a brand new correctional facility could cost $115.00 a square foot. He advised the group to work with persons knowledgable about construction and its costs, including state public works divisions, in developing budgets. Another suggestion was to get in touch with colleagues and counterparts who have gone through the process, and ask for advice and insights. One other way to gain valuable information is to travel to other institutional libraries and view the operation firsthand. To do so, it is important to get travel costs built into the planning budget.

As an additional resource, Mr. Larson suggested writing to McGraw-Hill, publishers of ARCHITECTURAL RECORD, and requesting copies of sub-group indices, which they provide. Using the indices, it is possible to identify recently built institutional libraries and to write directly to the institutions for further information.

Mr. Larson began and ended his free-wheeling response to written and oral questions by exhorting the workshop participants to be assertive, to be informed, to increase the knowledge of human resources available to assist in planning, and -- TO PREVAIL.

ARCHITECTURAL RECORD. McGraw-Hill, Inc., 1220 Avenue of Americas, New York, NY 10020.

KOBERG, DON AND BAGNELL, JIM. The Universal Traveler. A soft-systems guide to creativity, problem solving, and the process of reaching goals. New ed. Kaufmann, 1976. Paper. $5.45.

H O T T O P I C S

Members of the Design Team determined that there were some topics of which institutional library consultants need to maintain current awareness, but which could not be considered in depth during the time available for the workshop. Out of the many topics suggested, three were selected. Time was built into the agenda for participants to exchange information, concerns, and ideas related to the topics. Summaries of discussions were submitted by group leaders, and appear below:

Synopsis of Bibliotherapy Discussions

Rhea opened each group by suggesting that she explain her definition of bibliotherapy as a basis for discussion; then each person could raise questions, share experiences, etc. She stated that bibliotherapy shouldn't be a "hot topic" as it is a direct outgrowth of regular library services. It is so controversial because of misunderstandings and confusion over the term. She admitted that she finds two things objectionable about the word -- the prefix "biblio" and the suffix "therapy"! "Biblio" refers to books only whereas bibliotherapy can use any media. And "therapy" denotes cure, while bibliotherapy does not claim to cure.

Her definition of the field is "A program of activity based on the interactive processes of media and the people who experience it. The material, print or non-print, imaginative or didactic, is experienced and discussed with the aid of a facilitator (usually in a group). The goals may be insight into normal development or change in behavior." She dissected the definition, phrase by phrase, uncovering the "hidden controversies" in it.

Group number one asked about, and discussed, training for bibliotherapy and procedures for establishing a bibliotherapy program. Group number two also discussed planning bibliotherapy sessions and outcomes of bibliotherapy. The concept of co-leading a group and using a mental health liaison of some sort where co-leading isn't possible, were discussed. Group three shared experiences and concerns relating to ongoing bibliotherapy programs in their states. Leadership styles and personality characteristics of group leaders were discussed also.

Rhea Rubin, Director
Oregon State Library for
the Blind and Physically
Handicapped

The Arts and Games of Institutional Censorship

Marjorie LeDonne's premise is that censorship in institutions cannot be eliminated, but can only be contained. The institutional librarian's best course for containment is to overcome a natural reluctance for the role and become the designated censor for the institution. In that way, the librarian can establish the least restrictive policy and procedure possible. Most institutional censorship occurs because of staff fear of criticism from the administrative hierarchy or from outsiders. The librarian's willingness to assume this responsibility will eliminate the major force for limiting access to materials.

Methods of managing the burdensome role are as follows:

Know the limits set by law and administrative manuals. They vary from state to state and from institution to institution. Court decisions are generally more supportive of first amendment rights than restrictive.

Establish the limits of the librarian's authority. Does it extend to personally purchased reading materials by patients/inmates or only to the library collection?

Develop and have approved a materials selection policy. It should include a formalized procedure for challenging the librarian's decisions and bringing them to a higher authority. Having a form ready for the challenger to fill out will avoid many confrontations.

Understand the feelings of persons who challenge library selections. "I understand how you feel," is a magic phrase for reducing tension. Take care of feelings first and use logic last.

Never indulge in heroic posturing. First amendment rights are protected best by the librarian who uses quiet, steady, persistent persuasion.

Comments from participants were that self-imposed censorship done by librarians is more of a problem than is confrontation. Also that job descriptions would need to be rewritten if librarians were to assume the added responsibilities of censoring incoming materials. It was observed also that the trend is toward more restrictive legislation. Nevada passed an obscenity law and Montana has an obscenity initiative on the ballot.

Suggestions for follow-up were:

1) Compile list of pertinent court decisions and legislation for distribution.

2) Develop standards for selection policies and censorship criteria and procedures.

Marjorie LeDonne,
Institutional Consultant
California State Library

Synopsis of Legal and Medical Information Discussion

Susan opened each group by distributing a list of some suggested materials. A discussion followed which included the role of the librarian in the provision of legal and medical information: How much can we tell a patron, what resources to have on file, what to do if you are sued. Participants in each group shared how legal information was provided in their home state (self-help, volunteer lawyers, law students, etc.). All agreed that each solution had some drawbacks and the librarian would still have to face the patron who was anxious to have some information and might not have any other place to turn to. Susan related information about when she was sued while a jail librarian, and what the courses of action were that were most effective.

All the participants expressed a desire for some clear-cut training in legal reference for patrons and librarians. It was suggested that Western Council approach West Publishing or some other group and request some information on a packaged A-V presentation concerning legal reference for the non-lawyer.

S O M E S U G G E S T E D M A T E R I A L S

American Civil Liberties Union Handbook Series.
Rights of Hospital Patients, Avon, $1.50.
Rights of Mental Patients, Avon, $1.25.
Rights of Mentally Retarded Persons, Avon, $1.50.
Rights of Suspects, Avon, $1.25.
Rights of Prisoners, Avon, $.95.
Rights of Young People, Avon, $1.50.

American Correctional Association. Correctional Law Project. Correctional Law: A Bibliography of Selected Books and Articles. 1977. $1.75.

American Correctional Association. Correctional Law Project. Defenses to Civil Rights Actions Against Correctional Employees. 1977. $2.00.

American Correctional Association. Correctional Law Project. Legal Responsibility and Authority of Correctional Officers. 1976. $1.00.

American Correctional Association. Correctional Law Project. Model Correctional Rules and Regulations: Correspondence, disciplinary procedures, grooming and attire, search and seizure, use of force, visitation. 1977. $1.25.

American Correctional Association. Providing Legal Services for Prisoners: A Tool for Correctional Administrators. 1977. $3.00.

Joint Commission on Correctional Manpower and Training. Training in Law for Correctional Personnel.

Susan Loss, Consultant to
Institutionalized Youth,
Colorado State Library

ISSUES OF MANAGEMENT OF INSTITUTIONAL LIBRARY SERVICE PROGRAMS

Five work groups were assigned specific areas related to program management in the institutional library setting. Recorders for each of the groups reported to the participants in some detail, and time was allowed for further comments from the floor. Summary reports from group recorders follow.

Patterns of Organization of Institutional Library Services in the States

Members of the discussion group determined that they wanted to hear how things worked in other states. They wanted to hear the advantages and disadvantages of the various organizational patterns for institutional library services in the various states reporting. The following states reported:

Washington - Until recently institutional library services were provided in two ways. Staff libraries were served from the State Library and residents were served through contracts with local public libraries. In 1970 Social Security Act dollars became available and staff positions were transferred to public libraries. The problem with this arrangement was the question of who was boss. Recently a legislative committee study determined that it would be less costly to provide services directly from state agencies rather than through contracts, and as a result of this study, responsibility for the services was returned to the State Library. At the present time staff and materials are provided from the State Library and the facilities and operating costs are provided by the institutions. Some small LSCA grants were made to public libraries to develop collections for the developmentally disabled. The State Library is presently concerned about how to best provide services to community based programs.

New Mexico - New Mexico State Library has no legal responsibility for service to institutions. Institutions are administered by the Division of Corrections and the Department of Health and Environment but four out of 15 institutions are not administered by any state agency. The State Library has to deal with institutions directly since there is no central staff in Health and Environment concerned with institutions. The State Library provides direct LSCA grants to institutional libraries, but these are for very small amounts and generally the grant applications are for materials. The institutions provide funds for staff positions and the State Library Consultant has been encouraging the upgrading of these positions but does not assist in the formal interviewing process. The regional bookmobiles serve four of the correctional institutions, but public library outreach is only possible in two or three places.

North Dakota - Eight institutions, which includes the State Library, are administered by the Department of Institutions. There is approximately $25,000 in LSCA funds to be used for grants to institutions for libraries. To qualify for grant funds, institutions must have a library and at least a part-time librarian. The State Library has little to say in how institutional libraries are run. The State Library is presently rewriting the grant requirements.

Nevada - Management of LSCA grants for institutional library service was provided from the State Library until 1975. The State Library developed job descriptions for institutional librarians and urged institutions to provide matching funds. The institutions are now responsible for facilities, operation, selection of materials and staffing except for one of the two juvenile correctional centers, which will receive grant salary funds through fiscal year 1979. There are professional librarians in two institutions. Institutions may apply for direct LSCA grants. The State Library Consultant works with the institutional libraries in developing policies such as selection. Institutional support has been going up.

Oregon - The State Library provides LSCA funds for materials for the residents' libraries primarily. Institutions provide staffing. The State Library contracts with one public library to give service to one camp. Other public libraries are encouraged to cooperate with institutional libraries and get involved with outreach services to local jails, nursing homes, etc. The State Library sponsors about three meetings per year for institutional librarians and public librarians involved in outreach.

Colorado - The State Library is responsible for furnishing library service to institutions. The institutions are administered by the Department of Institutions, Department of Social Services and the Department of Corrections. There are three

institutional consultants on the State Library staff and state funding is used for materials. The institutions provide space, maintenance and operation and, in some cases, librarians. The Department of Institutions has requested the State Library to take over all of their library service and the State Library is having a study conducted regarding the advisability of doing this. Theda Kellner will provide copies of the study when it is available.

Alaska - The State Library provides service to all 16 institutions in Alaska including collections and catalogs. The institutions have not provided any staff or money. The State Library is trying to persuade the institutions to put money in their own budgets for library service. The regional coordinators visit the institutions and provide consultative services. The educational instructors from the correctional institutions have been brought together for workshops which have dealt with selection policies and use of legal materials. The State Library tries to get the public libraries to work with the institutions in their areas.

Montana - The State Library contracts with public libraries to provide service to six institutions and provides more direct service to the other five institutions. The librarians at two of these institutions are on the State Library staff. The State Library provides materials and interlibrary loan for these five institutional libraries. No direct LSCA grants are provided to institutions. The State Library has had some conversation with the Department of Institutions about budgeting more for institutional library service but no progress has yet been made. The institutions do provide space and maintenance and operation costs and salaries for three staff positions.

The participants in this discussion group agreed that the applicable statutes regarding institutional library responsibility and how the requirements are being met should be sent to Ruth Mahan in North Dakota. They also agreed to send samples of any contracts related to institutional library service to Ruth, who will be responsible for distributing these.

Recorder: Alene A. Cooper, Coordinator
for Library Development,
Montana State Library

Issues of Staffing, Personnel, Standards, Training, Etc.

The working group concentrated on issues involved in training institution staff, and the status of librarians in the institutions. Areas of discussion are listed below:

Training institution staff

Problems

- untrained inmates, volunteers, residents or institution staff
- high turnover rate
- communications
- librarians unable to leave institutions
- limited contact due to time, distances, etc.

Solutions

- meeting with librarians from institutions (exchange ideas, basic training)
- workshops
- library courses at local universities
- policy and procedures manuals
- hold meetings in different institutions
- staff exchange between institutions and visits to local libraries
- meet with other resource people to help prevent isolation
- correspondence courses (Loyola institutional course)
- public defender gives courses on legal materials
- periodic newsletter compiled on rotating basis between institutions
- reducing procedures to simple, functioning minimum
- audio or video tape/cassette introducing institutional consultant and going over basic library procedures for inmates, or those who can't get to meetings
- develop and work toward standards

Recorder: Bonnie Crell,
Library Coordinator,
California Youth Authority

Purposes and Kinds of Evaluation of Services

Evaluation is a continuing process rather than once a year
More is needed than the evaluation of the end product

Recommendation from working group is that a clearinghouse be established by and for the use of institutional library consultants in the Western States. Materials in the clearinghouse should include, but not be limited to:

- resources,
- forms,
- model projects, and
- model programs

Failures in terms of projects and programs should be included as well as successes.

Tools for evaluation of projects

- criteria (each state has its own),
- reports, statistical and narrative (monthly, quarterly, annual),
- needs assessment,
- program goals, and
- measurement (statistics; survey, questionnaires, etc.) method of self-evaluation (staff, residents).

Agency head should work with heads of agencies or institutions if consultant does not.

Recorder: Barbara G. Johnson,
Institutional Consultant,
Nebraska Library Commission

Budget Planning and Preparation

As a group, we feel the need for Western Council to develop a management handbook for institutional librarians.

As a group, we feel the need for a mission statement. Jim (Morgan) will provide PLA mission statements.

Max (Collotzi) will send goals and objectives process.

Marjorie (LeDonne) will send Theda the California Youth Authority monitoring forms and How to Monitor Federally Funded Project; Theda will evaluate. Max will assist Marjorie to work on a budget/management manual.

Each of us will try to determine per capita cost to provide library service, and compare. We will refer to the public library standards. Anne (Hegarty) will provide these to the group.

Recorder: Theda Kellner, ILS
Program Manager,
Colorado State Library

Effective Communications between Consultant and Institution

Discussion Topics:

1. Distances -- most effective means to communicate - letters, telephone.
2. How to encourage communication from institutions.
3. How to encourage communications between institutions.
4. How to communicate to institutions what we can do for them.
5. What to communicate to and between institutions in a workshop setting.

6. What kinds of messages will persuade administrators to make more favorable decisions for improved services for residents.

Communications between Institutions

1. Newslatter
   State Library -- all libraries -- institutional
   Departmental
   Library Association
2. Memos
3. Meetings
   Library
   Non-library -- other agencies and groups
4. Continuing education
5. Informal gatherings

Shared Problems

1. Isolation
2. Institutional hierarchy
3. Low status

Justifications for Institution Administration for Having Librarians Attend Meetings and Continuing Education Programs

1. What information librarian would gain -- provide specific agenda.
2. Librarian can bring back information to share with others -- should bring as much printed material back as possible.
3. Institution must be represented to have input in standards/decisions (in library meetings).
4. Library must be represented (in meetings of non-library groups).
5. May be paid out of grant or other funds.
6. Library service will be improved (in measurable terms).

Recommendations

1. Identify related interest groups who we can learn from -- can learn from us.
2. Piggyback other meetings.
3. Provide institutional librarians with needed vehicle to build self-esteem by development of abilities.

Recorder: Sara Wisdom,
Special Services Librarian,
State Library Commission of
Iowa

EVALUATION BY PARTICIPANTS

The opportunity to share ideas, problems, situations, and planning for institutions was most beneficial to me. Knowing that other states are experiencing similar problems makes a sometimes frustrating job much more bearable.

I will be "borrowing" the ideas of video-taping various library aspects and institutional problems and giving them to librarians in some of our institutions who have already indicated to me that they want to work on a similar project.

Knowing there is a possibility of a clearing house for "ideas" is good. We will try to share whatever we can.

The workshop was well planned and scheduled. Hopefully future workshops can go into more detail in various areas such as correctional institutions, law libraries, and materials and needs of mentally retarded. Training of existing institutional librarians could also become a more detailed discussion.

All in all - a <u>very</u> worthwhile two days!

****

Several things I got out of the workshop:
Some more ideas of where to get additional funds,
Information from Jim Larson on things to think of when remodeling/designing a library,
Many ideas on other ways to reach the administrator,
Liked getting together and sharing ideas, and
Disliked not having more time.

I hope to do when I return home - as a follow-up to the workshop:
Investigate several of the ways to get additional funds,
Work on various manuals (procedural, standards),
Would like to develop an audio cassette, with workbook (on several different subjects), and
Work up lists/biblio of non-print materials available through us on different subjects suitable for residents and/or staff.

SPECIAL THANKS for all the arrangements made to make this workshop a success - which it is/was.

****

Biggest merit of conference: 1) Structured substance - superb organization, excellent - pertinent - substance. I have never taken so many notes! 2) Informal interaction valuable, tho where informal interaction took over discussion groups I felt a bit cheated because usable information didn't fly so fast.

Drawbacks to conference: No major ones. The carefully thought-out main presentations were incredibly valuable (I said that already, didn't I?). Perhaps the problem sharing during group discussions, which I didn't particularly benefit from, was valuable to others, anyway.

Hopeful follow-up results: 1) We really must get that newsletter going! It can partially function as quasi-clearinghouse; 2) I would like to explore setting up some sort of interdepartmental task force in Washington as an institutional library advisory group; 3) I would like to get onto Marjorie LeDonne's mailing list too...I seem to steal my best ideas from California. Will be in touch to share Public Library Association's recommended ratios for staff: materials funding. Let either Kristy or me know what we can do!

****

Good things about the workshop: 1) The participants! Not only a joy to work with people who are working in same area but particularly pleased to find such a non-competitive, hard-working, sharing group of people. 2) Program was excellent! Good speakers. Variety of presentations and lots of work. 3) Particularly liked the way Carmela kept things moving and checked with group to see that our goals were being met. 4) Like emphasis on follow-up after workshop. I would hate to see all this enthusiasm drop. 5) Local arrangements from BJ and Nevada people deserve a special thanks!

Only one bad thing - unusually stuffy room.

Things to do at home: 1) Stay in touch with people I've met here so that I don't feel I'm working in a vacuum. 2) Prepare detailed profiles on each institution including organization charts, library costs/patrons, purpose of the institution as the institution sees it, etc. 3) Work with each institution to update (in most cases write for first time) policies with regard to book selection.

****

The Workshop has been a valuable introduction to me of the work of the Institutional Library Consultant, the variety of problems encountered, the variety of service needs, and how these problems/needs are being met. I felt that the Hot Topics was a good approach in the problem/service presentation area. Number of Topics might be reduced to two, each turned into a mini-workshop with an expanded time frame. The Wednesday a.m. sessions were also quite good with an excellent exchange of information. Bringing together library consultants who share similar problems is an excellent manner in which productively to solve those problems. Judging from the recommendations made and the follow-up proposed, the Western States will raise the level of institutional library services to a

considerable degree as long as the consultants don't become totally exhausted in the process.

I look forward to continued communication and work with the Institutional Consultants.

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Especially appreciated: Meeting other consultants; sharing information on resources available; grateful that workshop was a positive approach to new techniques and solutions and was not problem oriented; well organized sessions; good choice of places to eat; excellent packets with good materials.

Best sessions: Max Collotzi - on budget process; Trading Post - not enough time to see all displays; small group work; Hot Topics.

Least useful: Sessions on architecture too long - should have had more visual displays for that topic.

What to do next: Start a newsletter; gather together information and compile for distribution materials on - statutes and case law from each state on censorship; legal changes from each state for State Library Service to Institutions; examples of selection policy statements, contracts for service, duty statements, job descriptions, library civil service specifications from each state; compile rough draft for library management handbook; forward information on budget development and data to compare.

****

The Workshop offered many ideas for consultants to consider for future implementation. Funding sources will be extremely helpful and I specifically plan to make the information available to Colorado's institutions. Sharing common problems and discussing solutions has been most useful and communication with other participants should follow as a natural outcome.

The architect was excellent and gave advice which I shall put to use almost immediately since we will be involved in a library program for a new maximum security institutional facility.

I also liked the session on bibliotherapy and received some practical suggestions from Rhea which will be used at a new library in a mental hospital.

We did need a little more time for talking individually with other consultants.

****

Jim Larson was a very effective and informed speaker and his presentation seemed valuable to me. In the Hot Topics discussion Rhea Rubin's discussion was particularly informative to me. Many of the other discussions and speakers were also good, but these two were outstanding. The discussion group on patterns of organization of institutional library services was very valuable but too short. It was disappointing to not have enough time to sit in on the other discussion groups on Wednesday.

I intend to have a workshop for institutional librarians in the near future. Much of the material and information shared here will be useful but I need some time to evaluate it and to determine just how it will be incorporated in the workshop - this is a short rough objective - long range goals will take more time and thought.

****

This Workshop has been an excellent opportunity to meet with, talk to, learn from people whose jobs are similar to mine.

Specific things I have learned: 1) Need to apply clout - be assertive (PREVAIL upon) Administrators of institutions; 2) There are other people who share my problems and concerns with institution libraries and I have a list of their names and phone numbers!

What I plan to do when I get home: 1) Order everything on list of legal and medical materials - show them and make suggestions to institution librarians; 2) Photocopy bibliotherapy and many of Trading Post materials to distribute to institutions; 3) Arrange meetings with all institution administrators and go armed with as much documentation as I can to discuss staffing, training $$ and other problems; 4) Thoroughly investigate standards which have been written and work toward developing ones which are meaningful and credible.

All in all, I can't say all - an <u>Excellent</u> Workshop!

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The Workshop as a whole was excellent. It's chief benefit to me was that it gave me a chance to get together with colleagues, talk about problems, and see how others are doing their job. The resource speakers were excellent. The speakers were super inspiring, and the program well run.

I want to do two-three things when I get back: 1) Continue working with upper level administrators at the department level; 2) Get institutions to develop goals and objectives on a more regular basis; 3) Open up communications between public librarians and institutions by forming an outreach

institutional librarians roundtable in the State Library Association.

****

Would have been nice to have more time for unstructured "just talking." Perhaps social gathering the night before workshop formally begins, to get to know each other.

Am looking forward to actual sharing of some of the ideas/ information gathered at an upcoming statewide workshop for those working in institutions' libraries.

Like architect's presentation and real desire to respond to questions/ needs. Hot Topic relevant and practical - leaders good. In general each speaker gave me something I can use in my work.

Unfortunately room too warm and stuffy, especially first day. Not enough time for Trading Post materials.

Thanks to Western Council for organization and implementation of this Workshop with special recognition to the Design Team.

Follow-up: I'd be happy to contribute to a clearinghouse list, newsletter, or other follow-up activities. I'd appreciate back-up from Western Council members for greater emphasis in my state on service to institutions, especially through a staff member who can concentrate on their needs without a myriad of other duties.

Likes: Everyone's willingness to listen, discuss, share and suggest. I appreciated having real input into the program content and allowing us to determine direction once we were there. Architect was a great addition I'd not have thought of!!

Dislikes: Some things could have been shared in advance (or after the workshop) on paper and not taken up entire group's time (i.e. every state's organizational pattern). As time grew short I was uncomfortable taking time for things that could have been follow-up materials.

My follow-up: During the next year develop basic procedures manual for each institution and create an audio or video tape explaining institution services, interlibrary loan, mail-a-book, etc. Follow-up on some means of facilitating better use of legal materials for correctional centers.

****

I feel of all the workshops I have been to, this one has been the <u>MOST</u> applicable to my job and needs.

Direct needs that were answered: Planning, communication, budgeting.

Things I most liked: 1) The speech from the architect - it was interesting, well presented and answered very specific questions. I wish he could speak directly to my institutional librarians. Also really gained from the personal interaction between others in my position; 2) What I disliked - Larry Leonard really gave us no new information on sources. Also, time was really pushed - we had so much to cover in too short a time (there's no easy answer to this one).

Specifics I can use: 1) Immediate input to building consultants and design planners. Make an all out effort to be involved in every step of institutional planning; 2) Try to organize visits to institutions in nearby states (for me and for institutional librarians); 3) Establish a newsletter for my institutions that will get to each administrator and each librarian (in the institution); 4) Try to make my State Librarian more aware/sympathetic/in-tune to institutions and their needs; 4) Seek out any organization in my state that I might tie in to to increase visibility of library programs in institutions; 6) PREVAIL!

Thanks to Carmela and the Western Council!

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I appreciated the presentation by James Larson, encouraging a participative and assertive role by the institutional librarian in institutional library remodeling and building. It was valuable for him to detail the process.

Enjoyed the "off the wall" responses by Michael Melner to questions by librarians - when and when not to approach an administrator; a matter of timeliness, etc.

It is valuable to get to meet counterparts from other states, when it is often impossible for many of us to attend such national meetings as ALA Conference.

One disadvantage is that I felt the pressure of time.

I hope that what reports are requested will be well clarified, coordinated, and understood.

I hope to have more communications with these colleagues. It would be helpful to have some sort of media which shows who's doing what currently.

****

So far as program content I found the presentations by James Larson and Mike Melner especially realistic and helpful.

The meeting of peers and sharing ideas (and socializing) was equally invaluable.

After listening to the trials of consultants from other states I more fully appreciate how fortunate we are in Washington State.

Personally, I picked up some tips on budget procedures and generally had some training and programming interests re-ignited that I shall pursue upon return.

I think many times we become burned out, discouraged or indifferent after some years of concerned effort and a get-together like this helps to "recharge our batteries."

****

Re-think respective roles of state libraries and state institutions (their departments) in providing services to institutionalized - how to get big money for that.

Make clearer my consultant offerings that are not LSCA-related to the institutions which don't have LSCA grants.

Liked the Administrators' advice/tone - and rest of speakers.

Liked getting to know everyone.

Disliked lack of time to really go over Trading Post material.

My follow-up: 1) Will recommend our state present a workshop on space utilization, design, architecture to all our institutional librarians and key institutional staff; 2) Will share job descriptions.

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Examination of how other states organize/manage library service to institutions, with ideas for modifying/changing the established pattern in my own state. The issue of legal responsibility for institutional library service is one that we shall examine.

The most productive part of this workshop was the working sessions among small groups - the "Hot Topics" on Censorship was especially interesting, and both working sessions I attended on "Issues of Management" and "Issues of Staffing," etc.

The architecture session could have been longer - with more nitty-gritty on floor plans, etc.

Overall, sharing information, sharing resources, knowing what other consultants have done, are doing, was immensely valu-

able - and should, in the future, permit us to work cooperatively on common needs.

When I go back, I'll work on the following things (coming from this workshop): 1) To examine, study, recommend, etc. - at least, to attempt to come to some decision, with my administrators and librarians - about what the State Library is responsible for in library service to institutions; 2) And to work, at the same time, on policies that formalize State Library input into who directs the institutional library program: i.e. the selection of the librarian; 3) I'll also work on doing cooperative workshops, visits, etc., with consultants in a neighboring state.

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WESTERN COUNCIL OF STATE LIBRARIES

Directory of Institutional Library Consultants

October 1978

STATE LIBRARY	NAME	TELEPHONE	SCOPE OF RESPONSIBILITIES*
ALASKA	Peggy Cummings	907-465-2919	Institutions (all types); Supervises Blind & Physically Handicapped Program & Film Library
ARIZONA	James Morgan	602-271-5841	Institutions (all types); liaison to outside libraries, other agencies
CALIFORNIA	Carmela Ruby	916-445-4730	State hospitals; health information, handicapped, developmentally disabled; staff development and continuing education; general consultant
CALIFORNIA	Marjorie LeDonne	916-445-4730	State correctional institutions, local correctional institutions, aging
CALIFORNIA YOUTH AUTHORITY	Bonnie Crell	916-322-5654	Youth and adults in state correctional institutions; liaison to outside libraries, other agencies

STATE LIBRARY	NAME	TELEPHONE	SCOPE OF RESPONSIBILITIES
COLORADO	Theda Kellner	303-839-2174	Institutionalized adults; State Library ILS Program Manager
COLORADO	Susan Loss	303-839-2174	Institutionalized youth
IOWA	Sara Wisdom	515-281-4358	Institutions (all types); handicapped and disadvantaged; children, young adults, aging
MONTANA	Alene Cooper	406-449-3004	Institutions (all types); supervises Blind and Physically Handicapped Program; continuing education
NEBRASKA	Barbara Johnson	402-471-2045 ext. 25	Institutions (all types); liaison to outside libraries; supervises Film Audio-Visual department
NEVADA	Barbara Mauseth	702-885-5145	Institutions (all types); general consultant
NEW MEXICO	Sandra Scott	505-827-2033	Institutions (all types); public library outreach

STATE LIBRARY	NAME	TELEPHONE	SCOPE OF RESPONSIBILITIES
NORTH DAKOTA	Ruth Mahan	701-224-2492	Institutions (all types); handicapped; public libraries
OREGON	Alden Moberg	503-378-4922	Institutions (all types); public library outreach
SOUTH DAKOTA	Betty Siedschlaw	605-773-3131	Institutions (all types); liaison to other State departments
UTAH	Max Collotzi	801-533-5875	Institutions (all types); Buildings Consultant; Budget and Accounting Officer
WASHINGTON	Keith Clement	206-753-5596	Administers Special Services Division - includes institutions
WASHINGTON	Kristy Coomes	206-753-5424	Institutions (all types)
WASHINGTON	Anne Hegarty	206-753-3228	Institutions (all types)
WYOMING	Kathy Darcy	307-777-7281 ext. 11	General consultant; institutions; blind and physically handicapped; continuing education

*Typical associated activities include planning, training, evaluation, assistance on grants and special projects, compiles information and files, recommends purchases of materials.

BIOGRAPHIES

Clara Sims has been Chief of Central Program Services at Napa State Hospital since 1975. CPS administers the residents' library, coordinates compensatory education funds for the various school programs, oversees recreation and music programs, school programs, and the volunteer and foster grandparent program. Mrs. Sims' former positions include Assistant Program Director at Porterville State Hospital, Assistant Supervisor of Rehabilitation Services at Agnews State Hospital, and Staff Therapist at Camarillo State Hospital. She is a registered Occupational Therapist.

Michael Melner is currently Director of the Nevada Department of Human Resources, which administers the Divisions of Health, Welfare, Aging, Youth Services, Rehabilitation, Mental Hygiene and Mental Retardation, and Office of Health Planning and Resources. His background includes other state agency positions, notably, Director of the Nevada Department of Commerce, and Deputy Attorney General, and he is a member of the State Bar of Nevada.

Lawrence V. Leonard is Library Program Officer for State and Public Library Services of the United States Office of Education. He holds a PhD. in Library Science, and had an HEA Title II Fellowship in Library and Information Science. Member of numerous library associations, he has also co-authored Centralized Book Processing, and Management and Costs of Technical Processes. Former positions include Chief Librarian at the National Bureau of Standards, Boulder, and librarian at the Naval Ordinance Laboratory and at General Atomic in California, and the Martin Company in Denver.

James L. Larson, A.I.A., N.C.A.R.B., is with James Gresham & Associates in Tucson, and has also been teaching at the University of Arizona College of Architecture since 1973. He has been involved with numerous institutional architectural projects, including the Greenlee County Correctional Facility in Clifton, Arizona, remodeling of a dormitory at the Arizona State Prison, and the Coconino County Correctional Facility. He has taught a Design Option course in Correctional Architecture, and has published articles in Today's Business Magazine.

Rhea Rubin, currently Director of the Oregon State Library Services for the Blind and Physically Handicapped, is also a practicing bibliotherapist, and has conducted bibliotherapy training sessions to numerous groups of librarians. She also initiated such a service in the Cook County Jail (Chicago). Author of two titles in 1977, Bibliotherapy Sourcebook and Using Bibliotherapy: A Guide to Theory and Practice, she is also active in ALA's Bibliotherapy Discussion Group and Bibliotherapy Committee.

July 18, 1978

Dear Colleague:

You are receiving these materials as the designated participant from your state at the Western Council workshop: The Role of the Institutional Library Consultant. That training event will be a working session to which each of us will contribute from our experience and expertise. Enclosed are the Program, and questions and forms. In order to build an agenda providing topics and procedures that will benefit us the most, please complete and return them to me as soon as possible.

Objectives of the workshop...

Learn new skills

Gain information on new trends and developments

Establish working relationships among ourselves

Work out ways of sharing resources

Plan next steps, especially for our client libraries

Experiment in self-training

Clarify our consultant roles

Things to do...

Please complete forms 1-4 as soon as you possibly can, but...

give yourself enough time to get info from your own institutions' staffs where appropriate

Please type your responses so they can be duplicated for the speakers...thanks!

Look at the Program and be gathering from now on ideas, data and materials to share

Notes...

You'll be receiving reservations information from Barbara Mauseth, Nevada State Library, the middle of August

There will be more information on how to contribute to the Trading Post from Theda Kellner, Colorado State Library, the beginning of August

Please do volunteer for those segments during which you would especially like to facilitate discussion - don't be modest!

Only you, as your state's official representative, will be reimbursed by the Western Council for expenses

This workshop immediately precedes the Mountain Plains Library Association Annual Conference at Lake Tahoe

I'll be looking forward to hearing from you, and working with you in October.

Sincerely,

Carmela Ruby
Library Consultant

CR:pl

Enclosures

TO: Institutional Library Consultants FORM 1

FROM: Carmela Ruby, Consultant

DUE: RUSH! immediately...no later than July 31, 1978.

RETURN TO: Carmela Ruby, Consultant, California State Library,
P.O. Box 2037, Sacramento, California 95809

I need a final count and information about all participants in our Workshop.

Please provide below your various special assignments and areas of responsibility. Most of us wear several hats, not necessarily reflected by our job titles! This information will make the List of Participants more meaningful as a mutual resource.

Your State Librarian was invited in the March 21 letter from James Morgan to consider suggesting that an additional person from your state participate with us, providing that he/she came at their own expense. Such a person must be one who is operating at the same (consultant) level as ourselves, not at the institutional librarian level (there may be follow-up workshops for institutional librarians later). If there is an additional participant from your state, please include below:

Name	Library	Job Title	Work Telephone extension

Special responsibilities: _____

_____

_____

Name	Library	Job Title	Work Telephone extension

Special responsibilities: _____

_____

_____

Name	Library	Job Title	Work Telephone extension

Special responsibilities: _____

_____

_____

CR:pl
7-17-78

Western Council of State Libraries
"The Role of the Institutional Library Consultant"
October 9-11, 1978, Sundowner Hotel, Reno, Nevada

TO: Institutional Library Consultants FORM 2

FROM: Carmela Ruby, Consultant

DUE: August 15, 1978

RETURN TO: Carmela Ruby, Consultant, California State Library,
P.O. Box 2037, Sacramento, California 95809

Program Topic: "Issues of Management of Institutional Library Service Programs"
The whole morning, Wednesday, October 11, 1978

These six general topics were developed by the Design Team from the information you supplied it in 1977.

Please state your preference for the two topics that you want to work on:

1. Patterns of organization of institutional library services in the states _____
2. Issues of staffing, personnel, standards, training, etc. _____
3. Purposes and kinds of evaluation of services _____
4. Budget planning and preparation _____
5. Alternatives for delivery of services in the system, on the campus _____
6. Effective communications between consultant and institutions _____

A group will deal as it wishes with one topic for about 45 minutes, then switch to their second selection (these are peer discussions...no special expertise is required!).

****

IMPORTANT! OPEN AGENDA! if the program as presently constructed is omitting an issue you want discussed, please let me know and suggest ways it can be incorporated. This Workshop is a first; we certainly won't be able to have them often, so it must serve the priorities we have.

CR:pl
7-17-78

Western Council of State Libraries
"The Role of the Institutional Library Consultant"
October 9-11, 1978, Sundowner Hotel, Reno, Nevada

TO: Institutional Library Consultants FORM 3

FROM: Carmela Ruby, Consultant

DUE: September 1, 1978

RETURN TO: Carmela Ruby, Consultant, California Satte Library,
P.O. Box 2037, Sacramento, California 95809

Program Topic: "Funding Sources for Institutional Library Service Programs"
10:30 A.M., Tuesday, October 10, 1978

We expect that this sheet will capture some information about funding sources, other than the regular budgets of the institutions and LSCA, that have been successfully tapped for institutional libraries in the western states. A general discussion about these will follow an update on potential federal funding sources which will be presented by Larry Leonard, Library Program Officer, Office of Libraries and Learning Resources, U.S. Office of Education.

Please check with your institutions on this, and respond to the following:

1. To what agencies other than the State Library, have institutional libraries submitted proposals for library funding in the last two or three years? (In each case describe the purpose of the request, and whether or not funds were approved).

2. Are there established legal procedures and schedules that the institutions' central departments require for submission of a proposal for federal (or other) funding? Describe.

3. How have you been able to get timely information out to the institutions about funding sources? (E.g. a grants workshop, State Library Newsletter, correspondence/mailings, etc.)

4. I will bring information to discuss and share about grants and funds to the Workshop.

Name_____ Library_____

CR:pl
7-14-78

Western Council of State Libraries
"The Role of the Institutional Library Consultant"
October 9-11, 1978, Sundowner Hotel, Reno, Nevada

TO: Institutional Library Consultants FORM 4

FROM: Carmela Ruby, Consultant

DUE: September 1, 1978

RETURN TO: Carmela Ruby, Consultant, California State Library,
P.O. Box 2037, Sacramento, California 95809

Program Topic: "Library Service Areas in Institutions: architecture, design, utilization of space"
1:00 P.M., Tuesday, October 10, 1978

Our speaker, James Larson, Architect, wants to cover topics of greatest application to our concerns. He is aware that we work with institutions that are large, and may have several library service areas (main, on wards, in cottages, etc.), and small (one overcrowded room!); that are health (e.g. open to staff and patients) and correctional (with tight security needs) and special schools, etc. He knows that it is rare that an institution gets to design a library from scratch, so that we also need guidance at the planning stage on modification and utilization of existing spaces.

Please list below some of the questions and specific issues you'd like him to address, or that can be asked during the discussion.

1.

2.

3.

4.

5.

MORE!

CR:pl
7-17-78

Western Council of State Libraries
"The Role of the Institutional Library Consultant"
October 9-11, 1978, Sundowner Hotel, Reno, Nevada

HORRORS' TO AVOID SUCH A PREDICAMENT

FILL IN THE RESERVATION FORM BELOW FOR

GUARANTEED* ACCOMMODATIONS AT

THE SUNDOWNER HOTEL & CASINO
450 N. ARLINGTON AVENUE
RENO, NV 89503

OCTOBER 9,10,11, 1978 TO ATTEND A WORKSHOP ON

"THE ROLE OF THE INSTITUTIONAL LIBRARY CONSULTANT"

SPONSORED BY: WESTERN COUNCIL OF STATE LIBRARIES, INC.

- -

RETURN TO: BARBARA J. MAUSETH, DIRECTOR
LIBRARY DEVELOPMENT DIVISION

NEVADA STATE LIBRARY - CAPITOL COMPLEX
CARSON CITY, NV 89710 (702) 885-5145

BY: SEPTEMBER 8, 1978 *(GUARANTEE ENDS THIS DATE)

NAME: _____ TELEPHONE_____

AGENCY: _____

POSITION TITLE: _____

DATE OF ARRIVAL: _____ TIME: _____

DATE OF DEPARTURE: _____ TIME: _____

(COURTESY CAR SERVICE AVAILABLE FROM AIRPORT)

ACCOMMODATION NEEDED: SINGLE _____ $27.56, INC. TAX
DOUBLE _____ $31.80, INC. TAX

- -

BY THE WAY, REGISTRATION PACKETS MAY BE PICKED UP ANY TIME AFTER 5:01PM, OCTOBER 9, 1978, AT THE ALPINE ROOM, 5TH FLOOR. THE TRADING POST WILL ALSO BE SET UP FOR VIEWING AT THIS TIME.

WELCOME TO RENO: WE LOOK FORWARD TO WELCOMING YOU!

MEMORANDUM

TO: Participants and Representatives from the State Libraries of the Western Council Selected to Participate in "The Role of the Institutional Library Consultant" Workshop, October 10-11, 1978, Reno

FROM: Workshop Design Team: James Morgan, B.J. Mauseth, Theda A. Kellner, Vince Anderson, Edean Berglund, ex-officio Susan Loss

SUBJECT: The Trading Post (Monday night)

An opening activity for the workshop, the Trading Post, is planned for participants to get acquainted and to exchange ideas, information, give-aways, helpful documents, posters, and the like.

There will be no commercial displays permitted and no sales will be allowed. If you bring publications for sale from your State Library, you may accept orders if you wish, but this will necessitate someone attending your display area. There will be no mailing of items at the Trading Post.

Kinds of Items Requested

Items relative to institutional programs are requested for display: brochures, publications, selection policies, organizational charts, policies' manuals, procedures' manuals, scrapbooks, orientation kits or courses, posters, book-marks, standards/guidelines, public-information releases, bibliographies, issue papers, audio-visual presentations, transparencies, charts, graphs, innovative-program ideas -- in fact, any items which have been helpful in your role as an institutional library consultant.

You will be provided with:

1. A table for display.
2. Two chairs.
3. One sign, indicating state.

You must furnish:

1. Display items -- all items should show ownership mark of submitting library or individual.
   (a) "Freebies" must be clearly marked: "for distribution," etc. At least 30 copies should be provided.
   (b) Items to be retained must be marked "For display only" or "Do Not Remove."
   (c) Items you are willing to loan -- also marked "Available for Loan" and name and address of person or library to contact.
2. Someone to answer questions if your display requires explanation.
3. Any supplies necessary, e.g., staplers, paper clips, tape, etc.

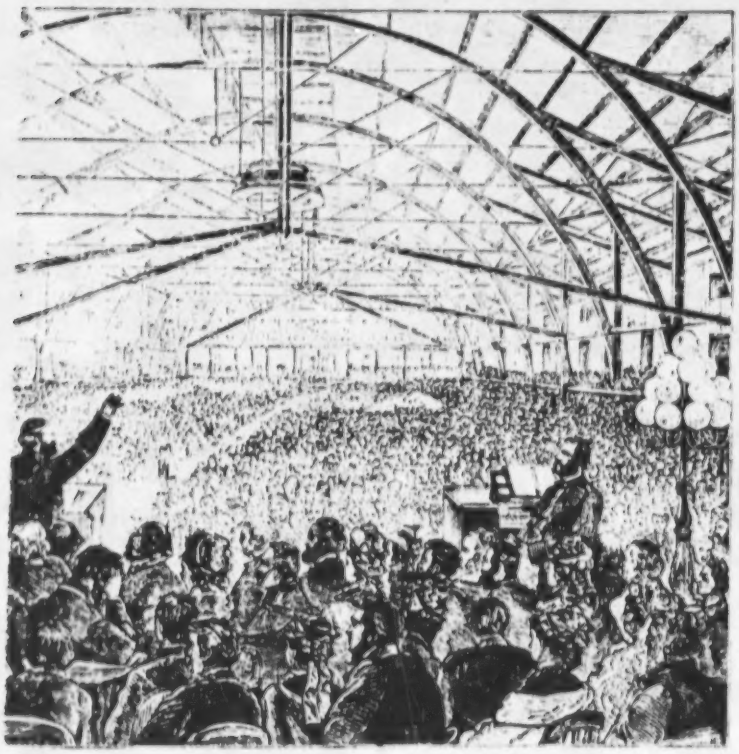
Equipment:

1. Some audio-visual equipment may be borrowed from nearby libraries but equipment requests must be sent to Theda Kellner no later than September 30, 1978.
2. Qualified persons must be provided to operate projectors, etc.

What to do in advance:

1. Fill out the attached form indicating whether or not you intend to take part in the Trading Post and return it immediately.
2. Send a list of items to be displayed and one copy of each "freebie" to Theda Kellner by September 30, 1978. If you are traveling by plane and want items transported for you, they must be received at the Colorado State Library by September 30, 1978.
3. Send complete descriptive information to each audio-visual item to be displayed, including title, format, content, running time, equipment needed, and name of person responsible for showing.

Please note: After the trading Post closes at 7:00 p.m. on Monday, October 9, 1978, you are responsible for pick up of materials.



MEMO TO: Rhea Rubin
Susan Loss
Marjorie LeDonne
FROM: Carmela Ruby

DATE: July 18, 1978

This will remind you of what we agreed to during ALA about the Hot Topics segment of the Program for the "Role of the Institutional Library Consultants."

Counting off by threes will form three groups, with which each of you in turn will work, so that everybody there will have the experience of small group discussion on each topic.

Each of you will prepare and present to each group some opening thought-provoking remarks about the issue, then assume that each session will run in total 35 minutes tops. Theoretically we could have 15 minutes for a recap before the general group, but by the time we move bodies around, I doubt we'll have it. And I'm sure that all will be tired and loaded with information by 5 P.M.

A reminder to Susan only that as soon as I have the information from the participants for Mr. Larson, will send it on to you for you and him.

****

MEMO TO: "Hot Topics" leaders, Marjorie LeDonne, Susan Loss and Rhea Rubin

FROM: Carmela Ruby, Reno workshop facilitator

DATE: September 12, 1978

SUBJECT: Instruction for your role in that segment of the program for the "Role of the Institutional Library Consultant"
3:00-5:00 P.M.

We are assuming that everybody will wish to participate in all three groups. Therefore before the session begins, we'll count off by three's.

We'll set you up in 3 different areas, you just stay put, and the groups will rotate to you.

Since each group can work a maximum of 35 minutes, you probably shouldn't take more than 10 minutes for your prepared remarks (standard for each group you'll have), leaving as much time as possible for discussion and questions.

You will each be responsible for having 25 copies of whatever you want to distribute. I would think it ought to be material participants can use later, that you refer to, and not material they are expected to read on the spot.

You may very well also want to have additional material at the Trading Post.

Please make sure, if you will, that we get a copy of your prepared remarks, or outline notes, which lay out the topic, the issues, the problem, describe what is up, or whatever. Some sort of informal workshop Proceedings are expected of us by the Western Council.

I am suggesting that the attached sheets, Comments and Requests for Follow-up, be used by each of you in each group. It may well be that in such a short session, people are left feeling that more needs to be learned, or said, or that they want more data from one of you or each other, and this could be noted on one sheet and dealt with afterwards.
The conference packets will have a guide for discussion groups work, which might be helpful to you.

MEMO TO: Panelists on the program: "Consultant Work with Administrators" at the Reno Western Council Workshop, The Role of the Institutional Library Consultant

FROM: Carmela Ruby

Thanks for agreeing to be on the panel.

The two administrators from Nevada (see your Program) will probably speak about fifteen minutes first, and then we hope that you will react to some of their comments, ask for amplification, and ask some questions of your own. They have seen the questions that were generated earlier (the last page of your packet), so have an idea of our concerns, and I am sure they will welcome informal discussion.

We felt it was very important to start off our workshop being able to talk with administrators about they perceive our role, what is useful about it to them, what kind of roles are we able to offer them, and how can we be more effective. It may be that what gets said at this time gets carried over into what we talk about the next morning too.

The program runs from 9:00 AM to just before 10:30 AM on Tuesday, October 10, 1978.

MEMO TO: Panelists on the program: "Funding Sources for Institutional Library Service Programs" at the Reno Western Council Workshop, The Role of the Institutional Library Consultant

FROM: Carmela Ruby

Thanks for agreeing to be on the panel.

Larry plans to prepare remarks that will take no more than one-half hour on what has turned up as potential funding sources.

You were each selected because the input you gave indicated that you had turned up, or are turning up, sources that others should hear about. Please take a few minutes to describe those, especially in terms of who the funding contact persons were, how they helped you (or not!), what the money went for, problems, other nitty-gritty.

Also, those of you who have provided training workshops, either on funding sources, or on how to prepare and present budgets, or manage grants once received could make some remarks about that.

In addition to being resource persons along with Larry, do feel free to generate discussion and questions from the rest of us. This is a critical issue! We never have enough money!

Please bring material about the funds and programs you describe to share with us.

The program runs from 10:30 AM to lunch on Tuesday, October 10, 1978.

Western Council of State Libraries
"The Role of the Institutional Library Consultants"
October 9-111, 1978, Sundowner Hotel, Reno, Nevada

9/19/78

MEMO TO: Design Team, "The Role of the Institutional Library Consultant" workshop

FROM: Carmela Ruby

RE: Chores...YOU are underscored!

Things will go more smoothly if we assign ourselves some behind the scenes work. These are the obvious ones...I've probably overlooked something... let me know or assign it to yourself.

Room arrangement (CR, BJ, JIM) for each day. Hotel helps.

Trading Post set-up (TK, SL, and participants themselves upon arrival) etc.)

No-host bar in room or bar Monday evening if we do it (BJ)

Notetaker of highlights for quick recapping to group as necessary (CR on Tuesday and SUSAN when she isn't "on"; SUSAN Wednesday; and BJ so she can conduct part of the Wednesday 2P.M. section)

Taping? (either BJ is arranging; or JIM could oversee cassette) mostly Tuesday.

Closing remarks, Wednesday...very brief, just to say goodbye and send us on our way! (JIM)

Clean-up. Boxing of Trading Post, other material, etc. (ALL who stay on Wednesday)

Closing remarks, very brief, and anything about dinner on Tuesday (BJ)

Opening remarks, directions for groups work, Wednesday (CR)

Bring this with you, or we'll all forget who's going to do what!

Return this form to:

Theda A. Kellner
Colorado State Library
1362 Lincoln Street
Denver, Colorado 80203

Please return immediately.

TRADING POST PARTICIPATION

Monday, October 9, 1978

_____ will take part in the Trading Post planned
(State)
for the opening night of the workshop, "The Role of the Institutional Library Consultant." _____(yes) _____(no)

We will provide the following items:

	Title	Type of Material
1.	_____	_____
2.	_____	_____
3.	_____	_____
4.	_____	_____
5.	_____	_____

_____ will coordinate our display
(person)
and will be responsible for delivery of materials, or mailing of materials, to Theda A. Kellner by September 30, 1978, and also for pick-up of materials at the close of the Trading Post at 7:00 p.m. on Monday, October 9, 1978.

MEMO: To Reno Workshop participants:
"The Role of the Institutional Library Consultant"
October 9-11, 1978

FROM: CR September 26, 1978

Here's the way the groups work is shaping up for Wednesday morning, based on your originally-stated interests, and our conversations about leaders and recorders (I hope I got it straight!):

Group 1: Patterns of Organization

Leader: Ruth Mahan, N. Dakota

Recorder: Sandra Scott, N. Mexico

Group 2: Staffing,Personnel,Standards

Leader: Peggy Cummings, Alaska

Recorder: Bonnie Crell, Calif.

Leader: Betty Siedschlaw, S. Dakota

Recorder: Sara Wisdom, Iowa

Group 3: Evaluation of Services

Leader: James Morgan, Arizona

Recorder: Barbara Johnson, Neb.

Group 4: Budget Planning and Preparation

Leader: Marjorie LeDonne, Calif.

Recorder: Theda Kellner, Colorado

Group 5: Effective Communications

Leader: Kathleen Darcy, Wyoming

Recorder: Kristy Coomes, Wash.

Only three signed up for Delivery Alternatives so perhaps that interest could be folded into patterns of organization.

Several expressed interest in Training for institutional staff, specifically, so we could break that out of Group 2 if the workshop desires. If so,

Leader: Carmela Ruby

Recorder: ??

Western Council of State Libraries
"The Role of the Institutional Library Consultant"
October 9-11, 1978, Sundowner Hotel, Reno, Nevada

Suggested Agenda for Groups Work on
Issues of Management of ILS Programs

DETERMINE THE TOPICS AND SCOPE OF THE DISCUSSION

What are each person's expectations of what they wanted discussed?

What are each person's needs for information?

DESCRIBE THE TOPICS, ISSUES, PROBLEMS, IN TERMS OF THE CONSULTANT ROLE

How can the consultant help improve the situation for an institution?

How can the consultant improve his/her methods and means of service?

WHAT KINDS OF INFORMATION ABOUT THE TOPICS DO CONSULTANTS HAVE OR NOT HAVE

Who has some data/information/solution to impart during the discussion about the topic?

Who has some that should be shared with members later?
NOTE THIS FOR FOLLOW-UP**

What resources (people in our states) do we have...or should create?

HOW DO THE TOPICS BEING DISCUSSED IMPACT ON CONSULTANT WORKLOAD?

Can approaches to the problem or issue be standardized, be recycled?

Any short cuts or efficiencies suggested?

Any uniform information/guidelines needed?

Any implications for how we organize our jobs, our contacts and communications?

SUMMARIZE HIGHLIGHTS OF THE DISCUSSION
FOLLOW-UP ACTIVITIES
RECOMMENDATIONS

** List specific documents/ materials to be shared later.

Western Council of State Libraries
"The Role of the Institutional Library Consultant"
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FACTORS WHICH LEAD TO PRODUCTIVE GROUP DISCUSSION

Leaders who:

...Make certain everyone knows everyone else.

...Review the objectives to be attained - restate the charge to the group. Make certain everyone understands the task to be accomplished.

...Initiate discussion through use of prepared Discussion Outline. Encourage every member of the group to participate.

...Set the tone for group involvement and let the group set its direction.

...Draw upon each person's expertise.

...Create an atmosphere in which participants assume responsibility for success of meeting.

...Summarize occasionally for benefit of group and recorder, to focus on areas of agreement and disagreement, key issues and prepare for transition to new topic.

...Are neutral.

Participants who:

...Speak their minds freely - each contribution is unique <u>but</u> don't monopolize discussion...give others a chance.

...If don't understand, say so. Ask for examples until it is clear.

...Indulge in friendly disagreement...if do not agree, say so, but remember that a sound conclusion is the only goal.

...Don't wait to be called on before speaking...strike while the idea is hot!

Recorders who:

...Are neutral.

...Will clearly summarize the group work and present it to the whole assembly so that all understand:

1. What the charge to the group was.
2. How it was modified.
3. Differing points of view and how (if) they were reconciled.
4. Factors from the discussion that made certain priorities emerge as the best.
5. Areas of consensus.
6. Recommendations and steps to take.

Adapted from: Library Planning Institute, University of San Francisco, San Francisco, California, June 23-27, 1975

Western Council of State Libraries
"The Role of the Institutional Library Consultant"
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CONSULTING - RESPONSIBILITIES AND TECHNIQUES

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Illinois. University. Urbana. Graduate School of Library Science. Changing Role of State Library Consultants: Report of a Conference Held at Allerton House, Monticello, IL. November 26-29, 1967, edited by Guy Garrison. Urbana: Illinois Union Bookstore, 1968.

Koch, William H. Jr. "A Stance Toward Helping: Reflections on the Role of a Consultant," Adult Leadership 16:202-40. (December 1967).

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New York. University. State Department of Education. State Library, Library Extension Division. The Role of the Consultant; articles compiled for the use of library consultants. Albany: 1965.

"Public Library Consultants - Who Needs Them? For What?" Wisconsin Library Bulletin 69-378-9. (November 1973).

"Role of the State Library Consultant," Top of the News 29:309-330. (June 1973). Articles on Children's and Young Adult Consultants by F.W. Summers, E. Burr, B.B. Mitchell and P. Finley.

Tilles, S. "Understanding the Consultant's Role," Harvard Business Review 39:87-99. (November 1961).

From: Robbins, Jane and Ann Powell. State Librarianship: Modular Curriculum. Wyoming State Library, 1976.

Western Council of State Libraries
"The Role of the Institutional Library Consultant"
October 9-11, 1978, Sundowner Hotel, Reno, Nevada

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